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ABSTRACT

Manuals are provided for SCORE, an industry-centered program designed to teach entry-level workers and trainees basic skills necessary for customer service and telephone sales. The metacognitive manual begins with a course outline and course description. The instructor guide consists of eight units: introduction, personal side of learning and performance, reading comprehension and comprehension monitoring, computer access and hardware familiarity, remembering/locating information, oral communication, written communication, problem solving, and mathematical problem solving. Components of each unit are time, purpose, teacher resources, equipment, audiovisuals, student resources, supplies, suggested learning activities, main points, and supplemental activities. The student guide provides main points, purpose, definitions, and questions for each unit. Masters for transparencies and student handouts, appendix with additional activities and answers, and glossary are provided. A software reference guide that explains how to use the courseware accompanies five instructional modules that explain how to use the courseware and teach the most common basic skills. Each module is divided into simulated real-life tasks the student must complete. A learner data disk is available. An instructor's manual familiarizes teachers with the courseware and provides scenario descriptions. Topics are information sharing, simple and complex customer contact, and sales. A vocabulary master (guide) accompanies a vocabulary development disk and familiarizes the teacher with this courseware. (YLB)

ED 369 957

S.C.O.R.E.

Sales and Customer Service Occupational Readiness Education

Manuals

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Sales and Customer Service Occupational Readiness Education

COURSEWARE FOR CUSTOMER
SERVICE/TELEPHONE SALES

presented by

Institute for the Study of Adult Literacy
College of Education

SCORE **(Sales and Customer Service Occupational Readiness Education)** is a comprehensive, industry-centered, model program designed to teach entry-level workers and trainees the basic skills necessary for customer service and telephone sales. The courseware, which is designed especially for mid-literacy level (grades 6-10) readers, consists of simulated job tasks the student must complete, such as reading, filling out forms, or finding information on a chart; students build their basic skills by doing actual job assignments. A vocabulary development package (disk and manual) includes customer service words, definitions, sentences, and practice activities. The classroom portion of the program involves instruction in metacognitive and self-system strategies in the work context. A demo disk (a representative sample of the *SCORE* software) is also available. This project is a collaboration among AT&T, Institute for the Study of Adult Literacy, and Florida Community College at Jacksonville, funded by the U.S. Department of Education, National Workplace Literacy Program. The software, distributed at cost, comes with an Instructor's Guide, Software Reference Manual, and a manual on teaching metacognitive/self-system strategies in the work context. (Available March 1994.)

Software: $456.00; Vocabulary Master: $30.00; Demo disk: $20.00.

Computer Requirements

	Macintosh	**PC/Window Compatibles**
Computer	Macintosh LCII, IIsi or better	IBM/PC Compatible with 20Mhz 80386SX or better
Monitor	640 x 480 pixels or larger (for example Apple 12" monochrome or Apple 13" color)	Monochrome or color with VGA or better
Operating System	System 6.0.7 or greater	DOS 3.3 or later Windows 3.1 or later
Memory	2 Megabytes RAM for System 6 4 Megabytes RAM for System 7	4 Megabytes RAM
Hard Disk Drive	20 Megabytes hard disk space	20 Megabytes hard disk space
Floppy Disk Drive	3.5" High Density	3.5" High Density
Peripherals	a printer (optional but recommended)	a mouse a printer (optional but recommended)

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Product	**Price**	**Qty.**
AT&T Software	$456.00	
Vocabulary Master	$30.00	
Demo disk	$20.00	
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Please specify: ☐ Macintosh ☐ IBM

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Institute for the Study of Adult Literacy
Penn State University
204 Calder Way, Suite 209
University Park, PA 16801-4756
(814) 863-3777
FAX: (814) 863-6108

S.C.O.R.E.

Sales and Customer Service
Occupational Readiness Education

METACOGNITIVE MANUAL: INSTRUCTOR-LED CURRICULUM

Curriculum Includes
- Metacognition
- Cognition
- Personal Side of Learning
- Job Performance

The contents of this manual were developed under a grant awarded to the American Telephone and Telegraph Company (AT&T) from the U.S. Department of Education, National Workplace Literacy Program (Project Award Number V198A20062). The contents do not necessarily reflect the position or policies of the U.S. Department of Education.

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S. C.◎R. E.

METACOGNITION, COGNITION, AND
THE PERSONAL SIDE
OF LEARNING AND JOB PERFORMANCE

A Curriculum for Customer Service and Telephone Sales Employees

Research, Curriculum Design and Lead Author
Linda Baker, Ph.D.
Department of Psychology
University of Maryland, Baltimore County

Research, Curriculum Design and Contributing Author
Paul Squires, Ph.D.
AT&T Corporate Human Resources
Morristown, New Jersey

Curriculum Design and Revision
Ron Natale
Urban Resource Center
Florida Community College at Jacksonville

Contributing Authors:

Lori Forlizzi, Ph.D.
Institute for the Sudy of Adult Literacy
Pennsylvania State University

Lynne Orr-Holley
Urban Resource Center
Florida Community College
at Jacksonville

Lorraine Cerro
Department of Psychology
University of Maryland, Baltimore County

Joseph Furando
Consultant for AT&T Corporate
Human Resources, Morristown, NJ

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INTRODUCTION

BRIEF COURSE OUTLINE

Part I

1.	Introduction	1 hour
2.	The "Personal Side" of Learning and Job Performance	2 hours

Part II **Metacognition, Cognition and Job Performance**

3.	Reading Comprehension and Comprehension Monitoring	2 hours
4.	Remembering and Locating Information	2 hours
5.	Oral Communication	2 hour
6.	Written Communication	2 hour
7.	Problem Solving and Decision Making	2 hours
8.	Mathematical Problem Solving	2 hours

The pre and post "surveys" take about 1 hour.

COURSE DESCRIPTION

The key objectives of the instructor led portion of this course are to provide customer service workers with:

(1) knowledge about characteristics of themselves as learners and workers

(2) strategies for dealing with the various cognitive demands of the job more effectively.

These objectives are achieved by providing instruction focusing on metacognition (knowledge and control of cognition) and on the self system (to be referred to as the "personal side" of learning and performance).

Research has shown that explicit instruction is critical in promoting metacognitive skills. The major goal of this course is to make students aware of the role of metacognition in several different cognitive domains, to provide them with metacognitive knowledge about factors affecting performance in each domain and give them an opportunity to practice the use of effective domain related cognitive strategies in a functional context. A second goal of the course is to make students aware of the importance of personal characteristics such as motivation, attitudes and self confidence. Cognition, metacognition and these personal aspects of learning are intertwined and act together to affect performance.

Written materials have been adapted from job related print materials. The situations and scenarios have been adapted from "critical incidents" collected from customer service supervisors describing real problems encountered in the workplace.

The particular domains selected for emphasis in the course represent skill areas that have been identified as important in customer relations work. The structure of each class will be a mix of guided discussion, brainstorming, collaborative and accelerated learning that is centered on student participation. Instructor modeling of strategies is integral to the success of this curriculum.

OVERVIEW

The purpose of the brief introductory unit is to introduce the students to the goals of the instructor led section of the course and to provide them with an overview of the constructs of metacognition and the personal side of learning and job performance.

The personal side of learning and performance will demonstrate how a variety of personal characteristics, including motivation, attitudes and confidence may affect their performance in learning and on the job.

Metacognition, reading comprehension and comprehension monitoring will focus on reading skills with particular emphasis on monitoring. The student will become familiar with strategies for evaluating whether or not he/she understands and dealing with failures to understand.

Remembering information and locating information are two cognitive activities where metacognition is important. Remembering information is central to the important task of learning new product and service information in order to provide the most current service available. Frequently, customer service representatives are expected to attend workshops where they are introduced to new products and services. Tests are occasionally given to determine how well the material has been learned. Accordingly, instruction in some general study strategies is appropriate and included using job related materials. It is important to be aware of one's own memory abilities and limitations. Equally important is locating information. Customer service workers are sometimes expected to search for information to clarify equipment or service needs or locate information critical to processing orders and inquiries. Within the past few years , increasing attention has been devoted to the cognitive and metacognitive processes involved in document search. Instruction will focus on strategies for increasing speed and efficiency of search.

In one analysis of customer service jobs, it was found that more than 25% of the job tasks involve some aspect of communication with customers. These communication tasks were rated by the supervisors as highly important to the job. Some typical tasks include describing features and benefits of products and services, questioning customers about their needs, providing information in response to a question, and explaining the terms of contracts. A great deal of research has focused on metacognitive aspects of communication, with respect to both speaking and listening. This information will be conveyed using critical incidents as illustrative examples and role play interactions providing feedback on performance.

Problem solving and decision making are also cognitive skills important to customer service work that have "executive" processes of planning, checking, monitoring and evaluating . Decision making and problem solving strategies will be developed and examined using collaborative instructional methods.

Problem solving in the domain of mathematics builds on material covered in the previous unit. Because many adults have anxiety about doing math. they can be reassured that there are no complex mathematical calculations here. Although some simple calculations are required, the emphasis is on reasoning about problems involving numbers. Problem solving and monitoring strategies are covered once again.

Throughout the course, students are presented with opportunities to use the knowledge, skills and strategies in simulations of on the job tasks. The simulations require the application and integration of the cognitive and metacognitive skills that are the focus of instruction in the computer based training (CBT).

TEACHING NOTES

Teaching notes were developed to assist in the implementation of this course. They are similar to lesson plans, and there are separate notes for each major lesson. The notes for each lesson contain the following:

TIME - the approximate amount of time needed for the lesson.

PURPOSE - explanation of the goal(s) of the lesson.

SKILLS - description of the skills to be developed.

TEACHER RESOURCES - background reading for the lesson, usually located in the appendix.

EQUIPMENT - list of equipment needed to complete the lesson.

AUDIO VISUALS - numbered transparencies to be used in the lesson.

STUDENT RESOURCES- list of materials to complete the lesson, such as activity sheets and handouts.

OTHER SUPPLIES - list of any other materials needed, such as markers, flip chart, etc.

SUGGESTED LEARNING ACTIVITIES - description of steps to follow to complete activities and help students develop skill(s).

MAIN POINTS - list of the main informational points. These can also be used for review.

SUPPLEMENTAL LEARNING ACTIVITIES - suggestions for additional or alternative learning activities.

PERSONAL COMMENTS - space for teacher notes or reminders for future reference.

TEACHING STRATEGIES - The teaching strategies used are:

Brainstorming	The instructor records all student responses for later discussion.
Collaborative Learning	Students working in teams for self-direction.
Concert Review	Review of lesson by displaying each transparency for a few seconds with music (Baroque or Classical) playing in the background.

Guided Discussion	Questions in the suggested learning activities to f facilitate discussion.
Instructor Modeling	The instructor models the process being discussed.
Role Playing	The students act out scripted roles.

INSTRUCTOR GUIDE

UNIT 1 INTRODUCTION

Time: 60 minutes

Purpose: To provide students with knowledge about characteristics of themselves as learners and workers.
To provide students with strategies for dealing with the various cognitive demands of the workplace more effectively.

Teacher Resources: The instructor should be familiar with the teaching strategies, teaching notes and course overview in the preface of this instructor led curriculum.

Equipment: Overhead projector

Audio Visuals: Transparencies 1.1, 1.2 and 1.3

Student Resources: Handouts #1.1 and #1.2

Other Supplies: Transparency markers in 2 or 3 colors

Suggested Learning Activities: Show transparency 1.1, Course outline. Review the outline and course description to provide students with details about the course structure and objectives. Distribute handout #1.1.

Show transparency 1.2. What is Metacognition?. Review the definitions of metacognition and cognition. Explain the two components. Ask students why they think it might be valuable to know something about their learning and cognitive processes and how to control them. Discuss student responses. Brainstorm to generate characteristics of effective learners. Distribute handout #1.2.

* If you know you have a hard time remembering names, you can do something special to be sure you'll remember them, such as writing down the name as soon as a customer on the phone gives it to you.

* If your purpose for reading is to get a general idea of what the material is about, you can read through it quickly (skim it) and save time.

* If you see that the problem you are asked to solve is very complicated, you can break it down into smaller parts to solve it more effectively.

Show transparency 1.3. The Personal Side. Ask students why they think it might be important to have knowledge or insight about personal characteristics of themselves as learners and workers. Discuss student responses.

* If you don't think you have the ability to make a particular sale, you will not try as hard to succeed.

* If you think you are terrible at math, you may be unwilling to attempt to solve a problem involving math.

* If you know you work more effectively when you have a specific goal you are trying to accomplish, you will be sure to set goals for yourself.

***** If introducing computer based training (CBT), explain that it will also increase metacognitive skills. Throughout the lessons there will be prompts that encourage the users to think about why they are responding in particular ways and taking particular actions.

Summarize lesson via concert review and transparencies.

Main Points:

To introduce the objectives of this course
To provide an introduction to the concept of metacognition
To show how metacognition affects learning and job performance
To introduce the personal side of learning and performance

Supplemental Learning Activities:

Personal Comments:

UNIT 2 THE PERSONAL SIDE OF LEARNING AND PERFORMANCE

Time: 2 hours

Purpose: To identify personal characteristics and demonstrate how they affect performance.
To provide tips on how to improve job and learning performance.

Teacher Resources: Instructor narrative on the personal side, appendix pages 1 through 4. Role play and scenarios are modeled on pages 5 through 19.

Equipment: Overhead projector

Audio Visuals: Transparencies 2.1 through 2.7

Other Supplies: Blank transparencies and markers

Suggested Learning Activities

Introduce the topic by showing transparencies 2.1, 2.2 and 2.3. You may substitute other appropriate signs exemplifying personal characteristics. Using a blank transparency and marker, brainstorm for personal characteristics that affect learning and job performance by asking the students to identify behavior that affect how they learn and perform. Their responses may include:

*Confidence
*Frustration
*Determination
*Competitiveness
*Patience
*Friendliness

Explain to the students that not all characteristics influence a person's ability to learn. For example, friendliness is a nice characteristic that we all admire but there is no definitive proof that it affects learning ability. Now they are going to learn the names for those characteristics and how they are related. Show transparency 2.4, Personal Characteristics that Affect Performance. Review each characteristic using the following questions and discussion. Allow students to submit personal examples throughout the review.

Ask, do you spend time *goal setting* or do you think it isn't worth the time? Do you set goals for the day, week or month? Successful individuals set goals and they try to attain those goals. It is also important to note that they do not become slaves to those goals, sometimes goals have to be changed.

One way that you might know when to change a goal or work strategy is through *feedback*. Are you able to make constructive use of feedback from others? Feedback also comes from yourself; do you pause during the day to assess where you are according to your daily plan? Do you make the necessary adjustments?

Discuss this quotation, "Aim at perfection in everything, though in most things it is unattainable; however, they who aim at it, and persevere, will come much nearer to it, than those whose laziness and despondency make them give it up as unattainable," Philip Dormer Stanhope (Lord Chesterfield). What do they think it means?

When a situation on the job doesn't work out as well as you had expected, do you think it is caused by your behavior or do you put the blame elsewhere? Successful, achieving individuals do not blame themselves but are aware of faulty and unproductive behavior that has caused the problems and do things in the future to prevent the same problems from occurring.

When you feel good about something, do you compliment yourself for your hard work and talents, or do you say "whew, I got lucky that time"? While the answer is sometimes both, the feeling of having control is *Attributional style*. Discuss with students how they make attributions when they succeed or fail. Do they blame themselves, blame others, or think that luck and fate determined their success or failure? Ask the students about how quickly they recover emotionally from failure. Do they let failure affect other learning or other work activities?

Ask, "Do you think *Persistence* is a desirable trait?" Are there times when it may not be desirable? Persistence is a desirable trait as long as the individual is sensitive to the situation and can determine when to continue and when to stop. Discuss the quotation, "There is no failure except in no longer trying. There is no defeat except from within, no really insurmountable barrier save our own weakness of purpose," (Elbert Green Hubbard). What do they think it means? Show transparency 2.4A and continue discussion with Thomas Edison's failure and success found in narrative.

Ask, Do you like trying new things, even if you get them wrong the first time? Do you feel that you have skills and abilities that enable you to perform tasks better than others? This characteristic is *Self-efficacy*, a judgment of how you function in different situations. Discuss these quotations with the students:

"There is potential in every human being. Believe in your strength. Learn to repeat endlessly to yourself: 'It all depends on me'."

"The history of the world is full of men who rose to leadership by sheer force of self-confidence, bravery, and tenacity."

Insure that the students understand the ideas that have been presented before continuing with exercise 2.1.

Exercise 2.1 is five scripted role plays with *self-talk*. Distribute exercise 2.1 to the students. The instructor copy or answer key contains discussion topics. Ask for volunteers. There are two parts for each scenario. Assign roles to the volunteers and give them a minute to read their lines. The entire group should listen and be able to discuss the positive aspects of the situation and potential future outcomes.

Follow up exercise 2.1 with exercise 2.2 in which there are four scenarios highlighting each of the personal characteristics we have been discussing. You can use role play or if there were problems in Exercise 2.1, you may want to read the scenarios and then discuss.

Upon completion of the role play exercises, display transparency 2.5, Tips for Top Performance. Review and discuss how the other personal traits relate to goal setting and/or planning.

One aspect of planning is making a to-do list. Ask how many of your students use a to-do list. Show transparency 2.6, Daily To-Do List. Explain that the list does not have to be too specific. Ask each student to write a to-do list for himself. Allow about five minutes and then share some of the lists.

Show transparency 2.7, Detailed To-Do List, as an example of a specific daily to-do list. This would be very handy when taking on new responsibilities. A detailed to-do list provides a plan to follow, a tool for feedback, a gauge for persistence, a process for attribution and maintaining the locus of control.

Complete the lesson with a concert review using all the transparencies including the first brainstorm transparency.

Main Points:

To introduce the terms; Goal setting, Attributional style, Persistence and Self-efficacy
To provide expert modeling of these behaviors
To understand the relationships among these behaviors
To demonstrate the effects of personal behavior on learning and work performance

SUPPLEMENTAL LEARNING ACTIVITIES:

PERSONAL COMMENTS:

UNIT 3 READING COMPREHENSION AND COMPREHENSION MONITORING

Time:	2 hours
Purpose:	To increase awareness of factors that affect comprehension. To increase awareness about the need to monitor understanding. To provide strategies to help monitor understanding.
Teacher Resources:	Appendix pages 20 through 28 contain background information exercises and answer keys for this unit.
Equipment:	Overhead projector
Audio Visuals:	Transparencies 3.1 and 3.2
Other Supplies:	Blank transparencies and transparency markers.

Suggested Learning Activities:

Introduce the idea of comprehension monitoring by posing two questions: "How do you know when you don't understand?" and "What do you do about it?" (Mention that we have all read something at one time or another that we had trouble understanding. Discuss student responses. This may be very difficult or responses may be vague. Continue with next step.

Show transparency 3.1, Comprehension Monitoring. Using the terms *evaluation* and *regulation*, show the relationship of metacognition to comprehension and comprehension monitoring. For example, comprehension monitoring involves the regulatory aspect of metacognition (as opposed to the knowledge aspect).

Ask the question "What are some reasons for not understanding?" Comments may include:

* not paying attention
* difficult vocabulary
* reading too fast
* materials not clearly written
* not motivated to read
* not interested in material
* no background knowledge about topic
* material written at too high a level

Clarify that some factors are internal (under our control) while others are external (not under our control). Some internal factors have been discussed in unit 2, The Personal Side.

Ask, "When should you keep track of understanding?"

- * while reading information that you need or want to understand
- * while reading information that you need or want to remember
- * While listening to information that you need or want to understand
- * while listening to information that you need or want to remember

Ask. "Why is it important to keep track of how well you understand?" Discuss responses.

- * If you read or listen to something without really thinking about it, you may not realize it doesn't make sense
- * So you can do something about it if you have trouble

Follow up by asking if they have ever experienced reading on automatic pilot, reading without thinking about the meaning.

Ask this last question, "when reading a passage, what do you think you should do if you realize you don't understand?" Record and discuss the comments, which may include:

- * ask someone for help
- * try harder
- * read the material again
- * look up word(s)
- * read slower
- * consult another source
- * read ahead for clarification

Show transparency 3.2, Questions for Evaluating Understanding. Briefly review the six questions.

Have students pair off and distribute exercise 3.1. Ask one person in each pair to read one scenario and identify which question(s) would be appropriate and why. If this exercise becomes too frustrating, involve the entire class as a single group led by the Instructor.

Explain that determining there is a comprehension problem is only part of the solution. The next step is to regulate understanding. One of the most frequent comprehension failures occurs when we don't understand a particular word. Read one of the passages in the previous activity. Ask what they might do when they realize that they don't know the meaning of a word. Discuss student responses which may include:

- read ahead **(often the best solution)**
- look in a dictionary
- ask another person
- ignore the word
- use context clues

Ask "Is it ever a good strategy to skip an unknown word?" When? Yes, when the word is not important to our purpose.
Ex: The award was given to Jason Allbright, a vociferous salesman.
If we are only interested in who received the award, vociferous can be ignored. Students may want to volunteer other examples.

Distribute exercise 3.2, Dealing with Unfamiliar Vocabulary. The directions are included in the exercise. Allow time for the students to complete the exercise; then discuss their responses.

Proceed with exercise 3.3. This should be done as an individual assignment; however, pairs or small groups are appropriate.

***** If using CBT, introduce the next lesson, Computer Access and Hardware Familiarity, before ending class. If the students are supplying their own diskettes, ask them to bring one (1) 3 1/2" disk to the next class. If the Criterion Referenced Test has not been administered, do so before proceeding with the next lesson.

Summarize the lesson via concert review and transparencies including the recorded responses of the students.

Main Points: How do I know when I don't understand?
What should I do when I don't understand?

Supplemental Learning Activities: Exercise 3.3 can also be a writing assignment. Ask the students to identify the problems and then rewrite the paragraph(s).

Personal Comments:

Supplemental COMPUTER ACCESS AND HARDWARE FAMILIARITY

Time: Varies depending upon computer literacy

Purpose: To identify the parts of the computer.
To demonstrate power up sequences for the appropriate computer system.
To provide keyboard and mouse skills.

Skills: No special computer skills are necessary.

Equipment: Overhead projector and computer system.

Audio Visuals: Transparencies S1 and S2

Student Resources: Handout #S1 and either #S2 or #S3 depending on computer system

Other Supplies: A blank 3 1/2" floppy diskette for each student

Suggested Learning Activities: Distribute handout #S1, Identifying parts of the computer. Show transparency S1, A Computer System. Ask the students to identify the parts of the computer by labeling the worksheet. Lay transparency S2 over S1 to show the nomenclature. Students can make necessary changes to the worksheet. The definitions for the terms: *monitor, hard drive, floppy disk, keyboard* and *mouse* are contained in the vocabulary list for this curriculum. Explain and discuss the use of the keyboard and mouse as well as the care of disks.

If you are using **IBM** compatible computers, ask the students if they have used computers before and then if they are familiar with ***Windows.*** If they answer **yes**, proceed with the startup. If they answer **no**, distribute handout #S2.

If you are using **MAC**intosh computers, ask the students if they have used MACs before. If they answer **yes**, proceed with startup. If they answer **no**, distribute handout #S3.

The appropriate handouts will address power-up sequences and program startup.

***** Once the students are able to power up their systems and use the mouse and Keyboard, proceed with Module 1, Introduction .

Main Points: To prepare the learner to use a computer.
To prepare the learner to use **CBT.**

Supplemental Learning Activities: If the students have difficulty with power up sequences, allow them time to practice (play) with the system.

Personal Comments:

UNIT 4 REMEMBERING/LOCATING INFORMATION

Time: 2 Hours

Purpose: To increase awareness of factors that affect memory.
To provide strategies to help improve ability to remember and locate information.

Teacher Resources: Appendix pages 29 through 42 contain exercises and answer keys for this unit.

Equipment: Overhead projector

Audio Visuals: Transparencies 4.1 through 4.11

Student Resources: Handout #4.1

Other Supplies: Blank transparencies and transparency markers

Suggested Learning Activities: Introduce the lesson by explaining that a person's ability to remember information changes as he or she grows older. Younger students usually cannot predict their memory performance because they don't use metacognitive strategies to test their memory. As we get older, we learn how to self-test and become more accurate in predicting memory performance in simple situations.

Continue by telling them there are two types of memory, **short term** and **long term**. We are going to start with **short term memory.**

Ask the students how many numbers they think they could remember without writing them down, if they had to go next door and repeat them to another person. Then ask how long they think they could remember these numbers. Their answers may vary. Explain that short term memory allows us to remember 5 to 9 pieces of information for about 20 seconds.

Tell the students that you are going to read a list of numbers and they should write down as many as they can remember, in order, after you have finished. They must not write them down until they are told to do so. Read the following list of numbers at the rate of one number every two seconds.

3 9 8 4 2 7 1 3 6 5

Read the numbers again so they can check their memory. Ask the students how many could they remember. Their answers should range from 5 to 9 with most responding 7.

Show the top part of Transparency 4.1, Memory for Many Digits. Ask the students how they might remember these 26 digits. Show the second part of transparency 4.1, Chunking Digits; this will make it a little easier. Finally show the third part of Transparency 4.1 and ask if this would help and if they have used this strategy before. Most will agree and realize that they can chunk digits on a regular basis to improve and test their memory.

Tell the students you will show them a list of letters. They are to recall as many as they can in any order they like. Now show them the top portion of transparency 4.2 for 10 seconds. Cover the transparency after 10 seconds and ask them to write down the letters they can remember. They should remember only about 7 of the 17 letters.

Next, show them the bottom portion of transparency 4.2 for about 10 seconds and ask them to recall the letters again. They should remember most, if not all, of the letters now because there are 6 meaningful chunks of information instead of 17 random letters.

Explain that **long term memory** differs from short term memory in that its capacity is potentially unlimited and these memories may last forever. Ask the students how can they remember a phone number for a longer period of time. They will probably respond with repetition or writing it down. These strategies demonstrate how information is processed from short term memory into long term memory.

Tell the students that you are going to read them a list of words. They are to remember the words in any order they can. Then read the following words at the rate of one word every 2 seconds:

Mountain Apple Coat Paper Brush House Sink Hammer

Customer Tree Radio Train Chair Potato Rock Soap

When you finish the list, tell the students to write down as many of the words as they can remember. Show them transparency 4.3, List of Words to be Recalled, and let them correct themselves.

When they have finished correcting their word lists, show transparency 4.4, Results of Memory Exercise. Poll the students on which words were remembered correctly and graph the results on the Transparency. Explain that the graph should demonstrate two features of memory: **the primacy effect** and **the recency effect**.

The primacy effect occurs when things at the beginning of a list are easily remembered. This happens because a person has more time to do something to remember these items while there is less interference from subsequent words. These words were actually remembered in long term memory. Ask the students how they went about learning the words.

The recency effect occurs when things at the end of a list are more easily remembered. This happens because they are the freshest in memory with less interference from other words. These words are stored in short term memory.

The lowest levels of recall should be in the middle of the list. However, other factors can affect memory, such as meaningfulness and distinctiveness. If many students remembered word 9, Customer, it could be attributed to special meaning since the students are being trained in customer service.

To demonstrate distinctiveness, read the list: Orange, Apple, Lemon, Grape, Computer, Peach. Ask: "which word do you think would be the easiest to remember?" **(Computer, because it is different from the other words which are all fruits.)**

Ask the students to describe some memory strategies. They have experienced a few in this lesson. Show transparency 4.5, Effective Strategies for Remembering Lists. Discuss each strategy using the example. Repetition and alphabetizing are very common strategies but are less effective than the first three on the transparency.

Ask the students how often someone asks them to memorize a list. Ask: "isn't it more common that you have to remember some information in paragraph or text form?" Most will respond with yes. Show transparency 4.6, Effective Strategies for Remembering Text Information. Review each strategy and explain the terms *mnemonics* and *acronyms*.

Explain that they are going to do an exercise now that will show them how easy it can be to remember things, even if they don't want to. Distribute the worksheet to exercise 4.1 (Learning Computers the Easy Way). Give the students a few minutes to fill in the "Before" section. They will probably know or guess a couple of the function keys. Proceed by reading the 10 imagery passages. The students should just sit back, listen and imagine. When you have finished, have the students complete the "After" and "Mnemonic" sections. They can do them at the same time or one then the other. Recall should be 90 to 100%.

Explain to them they have just experienced a combination of memory devices, imagery and mnemonics. Imagery is making pictures in your mind and mnemonics is using one item to remind you of another that is more difficult to remember.

Ask the students if they can give examples of acronyms. A *hint might be that they have seen some in this lesson already.* If they still don't respond, give an example like "FBI is an acronym for Federal Bureau of Investigation." Ask if their company uses acronyms? You may want to write some of their acronyms on a flip chart, chalkboard or blank transparency. Write the words in a vertical list and circle the first letter of each word to demonstrate how an acronym is developed.

Introduce the term acrostic by explaining that it is another device similar to acronyms. The letters that we would use to form an acronym are used to begin new words in a phrase that is easier to remember. Draw the following diagram on your blank transparency or flip chart:

F__________
E
D__________
C
B__________
A
G__________
F
E__________

Students learning to read music might find it difficult to remember which lines and spaces correspond to which notes on the scale. However the letters, E, G, B, D and F can be used to form an acrostic to help remember the notes in the lines (for example, **E**very **G**ood **B**oy **D**oes **F**ine.) *You can substitute an appropriate acrostic, this one is used because it includes an image that is readily remembered.* Before you go on, ask the students if they recognize an easy way to remember the spaces between the lines.

FACE.

Reinforce the lesson by asking the students to make up their own acronym and acrostic. Unit 4 examples are included in the notes on the appendix for your use.

This is a comfortable place to split the unit if time does not permit completion.

Explain that we have discovered ways to remember some short lists of words and letters, yet sometimes we must remember textual information as well as comprehend it. Summarizing is a good way to improve both comprehension and memory because the information is in your own words. Ask. "what is a summary?" Responses should include:

- shorter than the original
- includes the important information
- written in their own words

Ask, "why are summaries useful?"

- help them understand what they read
- help them remember what they read

Explain that there are two sets of rules for producing an effective summary: self management rules and summarization rules. These are included in the student guide.

Show transparency 4.7, Self-Management Steps. Discuss each step. Stress that students should do rules 1 and 2 before they begin to write, and rules 3 and 4 after they have written the summary.

Show transparency 4.8, Summarization Rules. These rules are important and part of the student guide. Discuss each rule to ensure understanding.

Show transparency 4.9, rule #1. Read the two paragraphs with the students. Ask, "how would you collapse the list in the first paragraph?" **ANS.:** The company has offices on the East Coast or the company has offices on the Atlantic coast. Ask, "the list in paragraph 2 is different but it can be collapsed, how would you do it?" **ANS.:** Customers place orders through a toll free number by giving the item information.

Show transparency 4.9, rule #2. Read the paragraph with the students. Ask, "what would you omit in a summary of this paragraph?" An example is: "the office complex has six buildings equipped for wheelchair access. Each building has beautiful landscaping and a cafeteria. "

Show transparency 4.10, rule #3. Read the paragraphs with the students and ask them to write a topic sentence for each paragraph. Discuss their answers.

Distribute exercise 4.2 , Rule #4, Condensing Paragraphs. This activity should be done on an individual basis to ensure understanding of the summarization process. Allow the appropriate time for your students to complete the exercise then discuss answers with the full class.

Now that students have been given expert modeling of the summarization process, distribute handout 4.1, Summarizing an Accident Form. The summaries on this sheet will be amusing, yet they illustrate for the student the need to be clear and concise.

Explain that we also need to test ourselves from time to time to accurately estimate our ability to remember. Read the following to the students:

"Pretend that I am your supervisor. I am going to ask you to complete several tasks that may not be part of your normal responsibilities, but you have agreed to help out. "

* check with Dan Peters to make sure copies are ready
* send out memos to everyone in the department
* prepare transparencies
* make sure an overhead projector is in place
* call catering to make sure lunch will be ready on time
* keep track of who will be attending
* arrange transportation from airport for regional manager Linda Thomas
* make sure minutes of the meeting are distributed to those who do not attend

Give the students 2 or 3 minutes to consider their ability to remember this information. Read the list again to see how many tasks they remembered correctly. Discuss strategies for handling this situation. They should include:

* write things down
* ask supervisor to repeat
* repeat names
* imagine doing all these tasks

There are some other strategies that are less effective for remembering text. They include:

* memorizing definitions out of context
* rereading several times (effective for short list but not text
* devoting equal attention to all information (be selective)
* not worrying about understanding if it is memorized (you need to know why it's important)

Introduce Locating Information as the final section in this unit by explaining that very often students will need to locate information from tables and it may be time critical. Here are three steps you should take to efficiently locate information in a table.

1. **Goal formation.** Decide what table you need to look at by identifying what it is you need to know.
2. **Category selection.** Use row and column headings as well as subheadings to decide which categories of information to look at.
3. **Selective inspection.** Find the specific information you need.

Exercises are included in the appendix for you to choose from. Have the students identify the goal, category and specific information in each exercise.

***** The student will begin working on module 2 of the CBT, Information Sharing, following this unit.

Complete the unit with a review of transparencies used during the lesson. Concert review is very effective here. Emphasize that the awareness of factors that affect memory is metacognitive knowledge and using the strategies we have discussed and experienced is metacognitive control.

Main Points: Effective and less effective strategies for remembering lists
Effective and less effective strategies for remembering text information
Locating information in a table and a table of contents

Supplemental Learning Activities:

Personal Comments:

UNIT 5 ORAL COMMUNICATION

Time:	1 Hour
Purpose:	To increase awareness of the strategies involved in effective oral communication. To provide practice in using effective strategies to improve oral communication.
Teacher Resources:	Appendix page 44 contains exercises and answer keys for this unit.
Equipment:	Overhead projector
Audio Visuals:	Transparencies 5.1 and 5.2
Student Resources:	Handout #5.1
Other Supplies:	Blank transparencies and transparency markers

Suggested Learning Activities:

Introduce the topic by asking, "what is communication?" Responses will vary but should include the transfer of information or ideas. Explain that an analysis of customer service jobs indicated that 25% of the job tasks involved some aspect of communication with customers. Also ask, "what kinds of things do you do on your job where communication is important?" Responses may include:

* describe product benefits and features
* describe services
* question customer to determine needs
* provide information

Explain that this information exchange can occur both orally and in writing. Introduce oral communication by asking, "what kinds of skills and strategies might be important in effective oral communication?" Student response should include:

* ask yourself, what does the customer need to know?
* ask questions if more information is needed
* take notes on important information
* make notes about what to ask

Explain that a good communicator needs to be sensitive to his/her audience (customer, supervisor, etc.). A good communicator needs to ask himself/herself the following:

- What do they need to know? How much information should be provided?
- What is the current level of knowledge about the topic?
- What will the audience be able to understand and how can I state it clearly and concisely.

Caution your students not to provide too much information; it may lead to confusion. Responses should be tailored to meet the individual's needs.

Show transparency 5.1, The Communication Process, and distribute handout #5.1. The handout offers space for the students to take notes. Discuss how communication involves both parties. It requires active listening and participation on the part of the listener as well as analysis and encouragement on the part of the speaker.

Divide students into four groups (depending on class size) and assign each group one of the scenarios in exercise 5.1 to analyze for communication weaknesses. Also have the group rewrite the scenario and perform (act out) the revised scenario. Student responses should include:

Scenario #1 - Customer service rep should have taken control of the call sooner
Slow down the conversation
Ask for name and account # at the beginning
Take notes
Scenario #2 - Ask the customer what he means by "tracking diagnostic procedures". Get specific information
The CSR needs to learn more about the company's products
Scenario #3 - Caller will become frustrated, may not continue doing business with the company
There was no sensitivity to customer needs
Should have explained the problem to the other representative
Possibly could have handled the problem anyway
Scenario #4 - The CSR did not display sensitivity to the customer
Too technical because of jargon and acronyms
Too much information

Student interaction can be enhanced by asking the following questions:

Has this happened to you as a customer?
How did you handle the situation?
How did you feel?

Refer back to the communication process transparency and reinforce the steps in the process of communication.

Explain that *following directions you receive orally from a supervisor* is also an important communication skill. The student can monitor his/her understanding by asking himself/herself a few questions. Do I understand what was said? Do I remember what was said? Does it make sense? Can it be done? Say, "I am going to give you some simple instructions to follow. I don't think any of you will ever be given these instructions but they will illustrate some problems that could occur in the workplace."

Read example 1- Put your left hand behind your back and leave it there. Then clap your hands together four times.

Read example 2- Clap your hands three times. At the same time, turn your head to the right. Before you clap your hands, look up at the ceiling.

Evaluate by asking how many students knew that they could not follow these instructions before trying or how many performed the actions out of sequence.

Complete this lesson by explaining that the skills involved in effective listening are similar to those involved in effective reading comprehension. There are also memory skills. Assess your memory and take notes if necessary. Show transparency 5.2 as a humorous example of what happens when communication breaks down.

***** The student should be prepared to begin working on Module 3, Simple Customer Contact.

Summarize the unit by pairing students and asking each to tell the other about the information presented in this lesson.

Main Points:

What skills and strategies are important in effective oral communication?
Demonstrate effective strategies for giving and receiving information.

Supplemental Learning Activities:

Personal Comments:

UNIT 6 WRITTEN COMMUNICATION

Time: 2 Hours

Purpose: To increase awareness of the strategies involved in effective written communication.
To provide practice in using effective strategies to improve written communication.

Teacher Resources: Appendix pages 45 through 47 contain exercises and answer keys for this unit.

Equipment: Overhead projector

Audio Visuals: Transparencies 6.1, 6.2 and 6.3

Student Resources: Handouts #6.1

Other Supplies: Blank transparencies and transparency markers

Suggested Learning Activities:

Introduce the topic by telling the students that we are going to shift our focus now to written communication. While your position may not require a significant amount of writing, there may be times when you are asked to write memos, letters, or short reports. Good writing only comes with lots of practice. This course will not provide much opportunity to practice but it will provide cognitive and metacognitive strategies that will help you write more effectively.

Ask the students to identify the three basic processes involved in writing. While there may be several responses that mean nearly the same thing, they should include planning, translating, and revising.

Show Transparency 6.1, Processes in Writing. Explain that **planning** involves generating and organizing ideas as well as goal setting (Unit 2). More time spent planning usually means a better document. There are two types of planning strategies; *global* and *local.* Global planning is having an overall plan and then following it. Local planning is writing what comes to mind first and then writing whatever comes to mind next. It is more like sentence by sentence writing. **Translating** is the process of putting one's ideas into words and then writing those words down. Translation is difficult because there are many different things to keep in mind at the same time:

Vocabulary: Is this the best word to use?
Mechanics: Is the punctuation correct? Should this be capitalized? Did I spell this word correctly?
Grammar: Did I use the correct grammar and structure for this sentence? Are the tenses correct? Do the subject and verb agree?
Meaning: Does the sentence say what I mean it to say?

Distribute handout #6.1, Letter to Welfare. This is not intended to make fun of the less fortunate but to demonstrate how easily our ideas can be misinterpreted when our writing skills are not effective.

Remind the students that if they have to spend a lot of time worrying about grammar and spelling, they probably will devote less time to planning and revising. If this happens, they may not communicate effectively to their audience. Practice will make a considerable difference here.

Explain that **Revising** has two components; evaluating and editing. This refers to the process of self-evaluation and self-editing written documents. Writers need to stand back and evaluate what they have written. They need to ask themselves appropriate questions that will help them decide whether their writing is adequate. The metacognitive skills involved here are very similar to those we talked about earlier in the course for monitoring comprehension of what someone else has written. There are many differences between more effective and less effective writers in their revising processes. Being aware of these differences will help you revise your work more successfully.

1. Better writers spend more time revising.
2. Better writers pay more attention to problems with overall effectiveness and structure (global problems).
3. Better writers evaluate what they actually wrote not what they intended to write.
4. Better writers are able to think of other ways to express their ideas.

These take practice!

Ask the students to identify some questions they can ask themselves after they have written a first draft. Show transparency 6.2. Review and clarify each question as necessary. Some points to make are:

1. You need to check for correct spelling, but you also need to make sure the words you have chosen are correctly used.
2. Sentences should be constructed using rules of grammar

and punctuation.

3. Check for accuracy, including but not limited to time, date and place.
4. It is important that pronouns (he, she, him, her) clearly refer to a particular person or thing. **(Incorrect) Example**: Aretha Johnson and Jenny McDonald were walking quickly down the street to get to work on time. She tripped on the curb and fell. The fall broke her wrist.
5. Are all the ideas clearly related to the topic? Focus on organization. **(Incorrect) Example:** Elmer went to the barber to get his hair cut. The barber washed his hair and put a cape around his shoulders. Elmer's dentist is next door to his barber. The barber cut and styled Elmer's hair. He does this every two weeks.
6. Sometimes we don't clarify information and it seems contradictory or senseless. **Example:** There was nobody on the elevator. It was so crowded, there was no room for me to stand. **Conclusion:** While these sentences seem contradictory, if the elevator was filled with office supplies, both statements would be true.
7. Make sure you have included all the needed information. Think what it would be like if someone left out one turn when giving you directions for getting to his house.
8. As in oral communication, consider your audience. Do they already know a lot about the topic? Make sure your writing isn't too technical or complex.

Explain that writing for our friends is different than writing for business contacts. Show transparency 6.3, Business Letter Format. Distribute exercise 6.1, Rewriting a Memo. Give the students time to identify as many errors as they can find and make appropriate corrections. This exercise can be accomplished as a group after the students have been given sufficient time to correct the memo on their own. Reinforce the need for structure and detail.

Once the pre-writing exercise is complete, distribute exercise 6.2, Writing a Business Letter. The amount of time allowed for this exercise should be determined by the writing abilities of the students.

***** These exercises should prepare the students for CBT Module 4, Complex Customer Contact.

Main Points: What are the processes in written communication?
What are the questions for evaluating written communication?

Supplemental Learning Activities: Handout #6.2 is available if more work on grammar and punctuation is needed.

Personal Comments:

UNIT 7 PROBLEM SOLVING AND DECISION MAKING

Time:	2 Hours
Purpose:	To introduce steps involved in solving problems. To introduce strategies for problem solving. To provide practice in using problem solving strategies.
Teacher Resources:	Appendix pages 48 through 50 contain exercises and answer keys for this unit.
Equipment:	Overhead projector
Audio Visuals:	Transparencies 7.1 through 7.9
Student Resources:	None
Other Supplies:	Blank transparencies and transparency markers
Suggested Learning Activities:	Introduce the topic by explaining that problem solving and decision making are cognitive skills that have important metacognitive components. The general "executive " processes of planning, checking, monitoring, and evaluating clearly come into play when trying to solve a problem or make an appropriate decision. Ask, "what is the first step in problem solving?" Follow up by asking what the other steps might be. When there seems to be a consensus, show transparency 7.1, The Problem Solving Process. Let the students compare their responses to the transparency. Did they leave out any steps? Now, let's consider each step in detail. Show transparency 7.2, Define the Problem. Explain that many of the problems they dealt with in school did not require this step. They were told to solve problem **X**, so they knew there was a problem and what that problem was. n real life they have to be aware that there is a problem and then decide what the problem is. If the problem is not easily understandable, there are several things you can do.

Simplify the problem and represent it concretely

- make mental images or pictures
- describe the problem in words
- talk it out
- write it down

Show transparency 7.3, Monthly Budget Facts. Tell the students to pretend that they are customer service representatives for a finance company and responsible for helping customers develop an appropriate household budget. You are attempting to help Mr. Brown plan his monthly budget. During the conversation you determine the following facts:

Mr. Brown spends more on rent than movies.
Mr. Brown spends more on books than on records.
Mr. Brown spends less on books than on movies.
Mr. Brown spends less on rent than on clothes.
Mr. Brown spends more on records than on food.

Question: What is Mr. Brown's largest monthly expense and what is his smallest monthly expense?

Answer: Use an external representation; clothes > rent > movies > books > records > food.

Ask several students to volunteer to show how they solved the problem. Does Mr. Brown need their help with his budget?

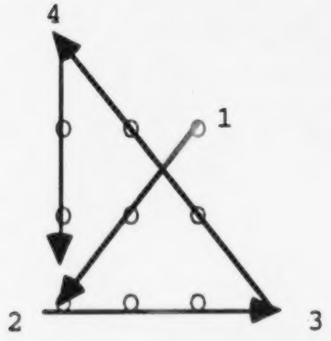
Show transparency 7.2 again. Explain that after we represent the problem, the next step is to:

Reconsider the problem

- make sure of all important facts
- eliminate unimportant information

Show transparency 7.4. This exercise is included in their student guide. Read the following: "you are to connect all nine dots using four lines and without lifting your pencils from the paper."

Solution:



Many people have difficulty completing this task because they incorrectly assume that the lines must be contained within the perimeter of the square formed by the outermost circles.

Show transparency 7.5, The Bank Account Problem. Have students attempt to solve the problem. If they decide to begin on day 1 and double it each day, they are wasting their time. The better solution is to reconsider the problem and see that the account is full on day 60, and since the bank doubles your money every day, the account must have been half full the day before on day 59.

Once again show transparency 7.2, Define the Problem. Emphasize the point, redefine the problem. If you realize that a task may be too difficult, don't just give up; change the goal or simplify the goal.

Explain that it is also very important to avoid jumping to conclusions. In the nine dot puzzle, some students probably tried within the perimeter of the dots. Try to keep your mind and options open. Tell the students: "your task is to discover the rule that I am using to generate a series of numbers. The numbers are 2, 4, 6. You can ask me if any other series of numbers fits my rule and I will tell you yes or no. Once you have gathered enough information, you can tell me what you think my rule is. **A hint is they should search for exceptions to the rule**. Most students will say 8,10, 12, then 14, 16, 18, which fit the rule. They may decide the rule is three consecutive even numbers but the rule is **any three numbers of increasing value**. (Ex. 1, 2, 3, or 5, 18, 24, or 28, 114, 3498).

Show transparency 7.6, Obtain Facts. In the previous exercise, some facts were not gathered by assuming we knew the answer? Did we request enough information? The process of obtaining facts also includes:

Considering what options are available
Looking back to experiences, ours and others
Determining our resources

Ask the students, "If you were going to assemble a bicycle, what facts could be helpful?" Another question to ask is," what are our resources?" Responses may include: I've done it before (experience); a friend or relative has done it before and can help; and ,of course, read the directions.

Use the following exercise to reinforce the need to obtain facts and not to jump to conclusions. " You work for a large hospital. A customer has called to say that he cannot afford to pay his bill." Ask, "what do you do?" If the students start to offer solutions, give them additional information; "this is the first time the customer has ever received hospital care and he had just joined a health insurance plan." Ask, "does this make a difference?" The rest of the story is that the customer misread his bill and is assuming that he must pay the total balance for his hospital care, $3,500, rather than the co-payment of $150. When he realizes his bill is only $150, he gladly agrees to pay immediately. Did the students assume the customer was unable to pay or did they gather more information and resolve the actual problem, the customer's misunderstanding of the bill?

Show transparency 7.7, Plan How You will Solve the Problem. Explain that spending more time planning usually means that less time will need to be spent attempting to solve the problem.

Consider this example. You will be visiting New Orleans next month. You know that New Orleans is a big city with many hotels, so you don't spend any time planning where you will stay while in town. Unfortunately, when you get to New Orleans, you find that the first hotel you try to stay at has no available rooms. The same situation occurs at each hotel you go to: no one has an available room. Apparently there is a large convention in town. You persist in your search and finally find a hotel with a vacancy, but this room costs **$400** a night!

Now you have wasted a great deal of time and money trying to find a hotel room. If you had spent more time planning your trip and had called ahead to make a reservation, you probably would have been able to reserve a suitable hotel room. Or you might have decided to postpone your trip if no suitable rooms were available. At any rate, if more time had been spent in the planning stage, less time would have been necessary when you arrived at your destination.

The next step, *break down the problem*, can be explained this way. Many problems are actually a collection of smaller problems. It can be helpful to break down a problem into several smaller problems and deal with them separately. For example, suppose you have to learn the information about a new product contained in a twenty page pamphlet. This may seem like a difficult problem, but there are some things that you can do to make it easier.
Ask the students what they might do to break this problem down.

After they have responded, explain that the trick is to choose the correct sized chunks of the problem to deal with at one time. Given 20 pages of information, reading and summarizing 10 pages at a time may still be too much, while reading and summarizing every paragraph is probably not enough. The appropriate strategy would probably be to read and summarize every 3 to 4 pages.

Tell the students to think back to the last big problem they had to tackle, like doing taxes or cleaning out the garage. Ask, "did you have trouble getting started?" Also ask, "did you find yourself doing a lot of small jobs in order to postpone the big task?" Explain that this is very common and if they could break that big task into several smaller tasks, it will be easier to take the next step because they have already begun. Getting started can be the most difficult step.

Continuing with the planning steps on transparency 7.7, ask the students if they know what an algorithm is. If they say "step-by-step rules," ask for an example. Explain that algorithms are used to solve math problems and diagnose car problems because algorithms are a specific set of rules. For example, if you needed to find out how much change you should receive when you purchase a twelve dollar item with a twenty dollar bill, you must subtract twelve from twenty. There is a specific set of rules to follow to perform the calculation. Algorithms, if followed correctly, will always yield a correct answer. The solution to this subtraction problem is an example of an algorithm. The next unit deals more specifically with algorithms.

Distribute exercise 7.1, Automobile Recall. This exercise will provide the students with a set of questions designed to help them make decisions. This activity can be used in small groups or by showing transparency 7.9. It is appropriate for class collaboration.

Introduce the term heuristics by asking the students if they know what the word means. Show transparency 7.7 once again. Ask the students to give examples of "rules of thumb." Explain that heuristics or rules of thumb are based primarily on experience. Offer this example: if you couldn't find your keys this morning you would rely on experience and look in coat pockets or under chair cushions, or you might look in the room where you usually leave your keys. This is an heuristic approach. If you used an algorithm, your solution would be to retrace every step you took since you last used your keys. This is very systematic and it should produce the desired solution, but is it realistic? In this case the heuristic is more useful than the algorithm. Remember that heuristics may not always work. They are based on experience and are less systematic.

For another heuristic example: suppose you are a customer service representative for a credit card company. You receive a call from a customer who is upset because she was charged $120 from a company she has never heard of. You recall a similar situation you had encountered with a previous customer. In this previous situation, the name appearing with the charge was a corporate name and was therefore different from the name of the place the customer had received services from. When you gather facts, you find that the same thing has happened here. Your customer made a $120 purchase at "The Best Ribs In Town" restaurant in Tolland, Connecticut, but the name and location on her bill were "Aventco" in Chicago, Illinois. Because you were aware of a similar situation, the solution was relatively easy to find.

Transparency 7.7 notes that "No one intentionally makes a bad decision. We always make the best decision based on the information we have at that time."

Show Transparency 7.8, Attempt to Solve the Problem. Explain that once you have a good strategy or group of strategies, try it. The real mistake is to think that this is the last step. Just because you produce a solution doesn't mean you've produced the best solution, or even a good solution. So don't forget the next step.

Advise that students must be aware that they need to monitor and evaluate the progress of their solution, and they must actually do it.

Remind the students of the discussion of ***persistence*** and that just because we have selected a strategy for dealing with a problem does not mean we are stuck with it. They should consider other solutions as they become available without giving in to compulsiveness.

Ask the students how other solutions could become available. One of their responses should be ***feedback.*** When we discussed goal setting in Unit 2, we relied on feedback. In problem solving, we should consider feedback from external sources. Sometimes another person will detect something we have missed. That doesn't mean the other person will always be right, but he or she can help you take a fresh look at what you are doing.

Ask the students if they have ever had someone tell them, "we've always done it this way; why do we have to change?" Explain that this happens because people have the tendency to solve new problems by using the same procedures that worked before. Remember, we recommended this strategy when we were obtaining facts. This strategy can also become a problem if it keeps us from seeing a new or better solution. Becoming aware that you may have a "mental set" that keeps you locked into one approach may help you to break out of that way of thinking when necessary.

You can generate student involvement by asking if they can recount a situation when they or someone they know was locked into a certain way of thinking and wouldn't try a new approach. If they don't respond, consider this example. You are working for a finance company and receive a call from a distressed customer. He has received a damaged sofa and wants to return it but the company he purchased it from has not provided him with the appropriate information. You also cannot get the appropriate information from the furniture company. The customer is becoming extremely distressed because he is moving from Delaware to Oregon in a few days. In the past you have been able to work things out between the customer and the company. Your traditional solution doesn't seem to be working right now and time is running out. Ask, "what do you do?" One possible solution is to have the customer send the sofa to your company to be held until you can straighten things out with the furniture company. Ask, "what are the benefits?" Responses may include customer good will and saved business.

Explain that not only was a traditional solution changed but something unusual was offered as a solution. Ask, "is it customary for a finance company to accept merchandise back?"

Summarize using transparency 7.1, The Problem Solving Process.

***** The students can begin working on the Forms and Charts units in Module 5, Sales or they can continue with unit 8, Mathematical Problem Solving.

Main Points: What are the five (or seven) problem solving steps?
How do you apply the steps to solving a problem?

Supplemental Learning Activities:

Personal Comments:

UNIT 8 MATHEMATICAL PROBLEM SOLVING

Time: 1 Hour

Purpose: To increase awareness of the need to monitor progress in solving mathematical problems.
To provide strategies for evaluating the effectiveness of approaches to solving mathematical problems.
To provide strategies for solving mathematical problems more effectively.

Teacher Resources: Appendix pages 51 through 53 contain exercises and answer keys for this unit.

Equipment: Overhead projector

Audio Visuals: Transparencies 8.1, 8.2, 8.3, and 8.4

Other Supplies: Blank transparencies and transparency markers

Suggested Learning Activities:

Introduce the unit by explaining that many of the general problem solving strategies covered in the last unit are also important when solving problems that involve math. The focus of this unit will be on strategies that deal specifically with mathematical problems.

Reassure the students that they will not have to deal with complex mathematical calculations. Although they will need to do some addition, subtraction and multiplication using decimals and percents, the emphasis will be on reasoning about problems involving numbers.

Customer service representatives are not often called upon to perform complex mathematical calculations themselves. Depending on their specific job responsibilities, they may have to do billing adjustments or answer questions about the costs of products or service.

Metacognition plays an important role in solving math problems, as it does in other job-related tasks. We need to monitor our progress in math just as we need to monitor our comprehension when reading and our communication effectiveness when speaking.

Ask, "what kinds of standards or criteria do you think people should use to monitor their progress in solving a math problem?" or "how would you know when you have successfully solved a math problem?"

Discuss student responses. Responses may be limited to comments about checking the correctness of the calculations. This is typical of many people's conceptions in math problem solving, in part because correctness of calculations is so often the primary emphasis in math instruction.

Explain that there are several different questions people should ask themselves when they are working on math. We will consider these questions now. You will have a chance to see how each question is important as we work through some problems together. Before considering specific questions for monitoring progress, let's look at the general sequence of steps to take in solving a math problem.

Show transparency 8.1, Steps in Solving Math Problems. Explain the following:

1. **read the problem**- during this step you should monitor your comprehension, just as you do when reading other kinds of materials. Many of the general questions we considered earlier are appropriate here, such as asking yourself whether enough information is included.

2. **decide how to solve it**- You need to think about what the problem is asking and make several different kinds of decisions, such as what operation(i.e., addition, subtraction) is appropriate.

3. **solve it**- is nothing more than performing the calculations you decided are necessary.

4. **examine to see if the answer is sensible**- not only should you check to see if the calculations are correct, but also be sure that your solution makes sense and is the best solution possible under the circumstances. we'll be devoting most of our attention to step 4 today.

Show and discuss transparency 8.2, Questions for Evaluating Mathematical Problem Solving.

Introduce the strategies for analyzing problems by reminding them about *heuristics.* We discussed these in the previous unit. These "rules of thumb" sometimes give you ideas or solutions that will help you, but not always. Remember heuristics are different from algorithms which will always lead to the correct answer. We'll consider four important heuristics now.

1. **Does the solution make sense**

Bus Problem: A total of 130 employees signed up to go on a company picnic. The vice president of the company decided to charter some buses to get everyone to the picnic. How many buses will be needed if each bus can hold 50 passengers?

Before you decide on your answer to this problem, be sure to ask yourself the critical question: Does the solution make sense? It is important to evaluate the sensibleness of your solutions with respect to the real world.

If you perform the division correctly, you will end up with either 2 3/5 or 2.6. But is this really the answer to the question that is asked? No--it makes no sense to charter a fraction of a bus; you need to round your calculation up to the nearest whole number: 3.

This shows again, then, that it's not enough to perform a mathematical calculation correctly; you also need to think about the *sensibleness* of the answer; what the question is really asking.

2. **Look for similarities with familiar problems.**
   Explain that this approach, for determining how to solve the problem, is to see if the problem looks like a familiar problem. If it does, you can use the same solution strategy you used successfully with the first problem to see if it works with the new problem.

Show transparency 8.3, The Refreshment Problem. Work through this problem with the students, modeling your thought processes. If you perform the division correctly, you will end up with an answer of 6.25. Since you can't buy a fractional cake, the response does not make sense with respect to real world practicalities of the situation. Consider also that some people may not want a piece of cake, so you could get by with 6, yet others may want more than one piece, so perhaps it would be better to go with 7. Ask if there might be other considerations. Is cost a factor?

3. **Make a drawing to represent the problem.** Explain that an approach for helping to define and understand the problem is to draw a picture or diagram. This approach is especially helpful when dealing with fractions or geometric shapes.

Show transparency 8.4, The Copier Problem. Work through the solution of this problem with the students. Model your own decision making and draw a representation on a blank transparency or white board. (Since the machine is 50" long it won't fit on either side of the window. The machine is 45" high so it won't fit under the window which begins 36" from the floor.)

Explain: You as a customer service representative must reluctantly tell the customer that the machine will not fit in the space provided. (Some students may suggest that the machine be turned sideways.) Ask the students what, if anything, can be done to satisfy this customer. The representative could ask if the machine could be placed somewhere else or if a smaller model could meet her needs.

4. Estimate what you think the answer should be. Estimation is an important checking strategy, something we could do after we performed a calculation to see if our answer is in the ballpark. There are a number of other important advantages of estimation that we should consider now.

Ask why estimation is a valuable problem solving strategy in mathematics. Discuss student responses which may include:

* Estimation is important as a preliminary problem solving strategy. We can make an intuitive estimate of the answer and then check the solution against the estimate. If the solution doesn't make sense when compared to the estimate, this is a signal that something is wrong and we should analyze the problem more carefully.

* Estimation is becoming even more important in this day and age, as computers and calculators simplify the task of computation. Many people mistakenly assume that whatever number comes up on the calculator must be correct, failing to realize that they may have punched in the wrong numbers. We need to be able to determine if the solution on the calculator makes sense.

* Estimation is valuable because it is easier to reason about logical and numerical relations when the numbers aren't "cluttered" by fractions and decimals.

* Estimation is valuable because it is easier to perform mental calculations with round (whole) numbers than it is with exact figures, especially when they involve fractions and decimals.

* Other?

Discuss *estimation strategies*. Estimation is usually performed mentally rather than using pencil and paper. There are a variety of strategies that can be used in estimation. These are considered now with example problems illustrating their use.

Change the problem by making it into a simpler one.

Problem: You are a customer service representative responsible for handling telephone orders. Your supervisor asks you for a rough estimate of the num

Monday	43 calls
Tuesday	56 calls
Wednesday	49 calls
Thursday	52 calls
Friday	47 calls

Ask the students how they might estimate the answer. Work through the solution with your students. You notice that all the numbers are fairly close to 50 and you know you have 5 numbers. Instead of adding 5 numbers, you could multiply 5 by 50 the rough average of all the calls. Your estimate would be 250. Ask the students how this process of estimating compares to performing the calculation? (247) Ask which approach is quicker.

Simplify the problem by eliminating decimals and rounding to the nearest five or ten's place.

Problem: As a first step in helping Ms. Watson select the best plan for her telephone service, you need to figure out her average monthly phone bill. Here are the figures for the last six months: \$26.21, \$42.15, \$18.33, \$51.99, \$34.67, and \$29.99. Estimate her monthly bill.

Allow the students a few minutes to figure their estimate then work through the solution with them. First you need an estimate of the total bill. This involves addition: 25 + 40 =65; +20 =85; +50 =135; + 35 =170; + 30 =200. (Rounding to the nearest five makes the addition much easier.)

To estimate the monthly bill we need to divide. To perform the division we use another estimation strategy:

Convert the problem into one involving well known number facts. An example is multiplication by 10.

Continue, 6 does not divide evenly into 20, so it won't divide evenly into 200. But 6 does divide evenly into 18, 3 times, so 6 into 180 is 30. And 6 into 240 is 40, so 6 into 200 must be a little more than 30, say 33.

Ask the students how this compares to their estimate and how it compares to the actual solution.

Distribute exercise 8.1, Estimation Problems. Exercise 8.1 consists of assorted problems that require a variety of problem solving strategies for effective solution. Students should complete the problems independently, however, collaborative and team efforts are equally effective. Discuss student responses.

Main Points:

What standards or criteria should be used to monitor progress in solving mathematical problems?
What are the steps to take in solving math problems?
What are the questions for evaluating mathematical problem solving?

Supplemental Learning Activities:

The Computer Based Training relies on the ability to convert percentages to decimals and multiply. Additional work in math computation may be necessary before attempting module 4.

Personal Comments:

STUDENT GUIDE

UNIT 1 Introduction

Main Points:

To Introduce the objectives of this course.
To provide an introduction to the concept of metacognition.
To show how metacognition affects learning and job performance.
To introduce the personal side of learning and performance

Purpose:

To provide students with knowledge about personal characteristics that affect them as learners and as workers.

To provide students with strategies for dealing with the various cognitive demands of the workplace more effectively.

Definition: ***Metacognition*** is the knowledge an individual has about his/her own learning, cognitive processes, and the control of those processes. Metacognition has two parts; knowledge about cognition and regulation of cognition.

Cognition is the mental activity that leads to learning.

Questions:

Why might it be valuable to know something about your learning and cognitive processes and how to control them?

Why is it important to have knowledge about our own personal characteristics that affect you as a learner and worker?

Student Guide

UNIT 2 The Personal Side of Learning and Performance

Main Points:

To introduce the terms: **G**oal Setting, **A**ttributional Style, **P**ersistence and **S**elf-efficacy **(GAPS).**
To provide expert modeling of these behaviors.
To understand the relationships among these behaviors.
To demonstrate the effects of personal behavior on learning and work performance.

Purpose:

To identify personal characteristics and demonstrate how they affect performance.
To provide tips on how to improve job and learning performance.

Definitions: **Goal Setting-** describes a process for attaining mastery. They should be specific and challenging and yet flexible to be changed according to feedback.
Attributional Style- is how you judge your success or progress.
Persistence- is your skill at knowing when to continue working hard in spite of frustration and failure.
Self-efficacy- is your judgment of how you function. It means closely associated with self confidence.

Questions: Do I compliment myself for my hard work and talent when I feel good about something?
Who or what do I blame when things don't work out as well as I hoped?
Do I try new things even if I get them wrong the first time?
Do I spend time planning? Do I set goals?
What do I do with feedback from supervisors and other workers?
Am I persistent? Do I know when to quit?

Student Guide

UNIT 3 Reading Comprehension

Main Points:

How do I know when I don't understand?
What should I do when I don't understand?

Purpose:

To increase awareness of factors that affect comprehension.
To provide strategies that will help increase comprehension.
To increase awareness about the need to monitor understanding.
To provide strategies to help monitor understanding.

Consider:

If you read or listen to something without really thinking about it, you may not realize it doesn't make sense.
It is important to keep track of how well you understand so you can do something about it when you have trouble. Some of the times when you should track your understanding are:

* while reading information that you need or want to understand
* while reading information that you need or want to remember
* while listening to information that you need or want to understand
* while listening to information that you need or want to remember

Questions:

Are there any words that I don't understand?
Are there any ideas that don't fit with what I already know?
Are there any ideas that don't fit together because I can't tell who or what is being talked about?
Are there any ideas that don't fit together because I can't tell how the ideas are related?
Are there any ideas that don't fit together because I think they are contradictory?
Is there any information missing or not clearly explained?

Student Guide

UNIT S Computer Access and Hardware Familiarity

Main Points:

To prepare the learner to use a personal computer.
To prepare the learner to use Computer Based Training.

Purpose:

To identify parts of the computer.
To demonstrate power up sequences for several models of computers.
To provide keyboard and mouse skills.

Definitions:

Computer is an electronic device for rapid calculation and data comparison.

Monitor is an electronic device (like a television) used to display words and images.

Hard Disk also known as hard drive is a high volume disk on which data can be stored and retrieved.

Floppy Drive is the opening in the computer to insert a floppy disk or diskette. The drive will read information from the disk.

Keyboard is used to type text and numbers as you would on a typewriter. Depending on the program you're using, you can use special keys to give commands to the computer. These special keys are function or F keys.

Mouse is also an input device that can be used instead of the keyboard.

Click, Double Click and **Drag** are functions of the mouse.

Floppy Disk is made of thin flexible material with a magnetic coating. To protect it and make it easier to handle, the floppy disk itself is enclosed in a hard plastic case.

Computer Based Training also known as **CBT** is instruction delivered by a computer.

Questions:

Can I identify the main parts of the computer?
Can I "power up" the computer that supplies the CBT I am going to use?
Can I start up the CBT?

UNIT 4 Remembering and Locating Information

Main Points:

To identify effective and less effective strategies for remembering lists.
To identify effective and less effective strategies for remembering text information.
Locating information in a table and a table of contents.

Purpose:

To increase awareness of factors that affect memory.
To provide strategies that help improve the ability to remember and locate information.
To provide practice using these strategies.

Definitions: **Short term memory** allows us to remember 5 to 9 items for a duration of approximately 20 seconds.

Long term memory allows us to remember a limitless amount of information. These memories may last forever.

* Items can be transferred from short term memory to long term memory through the use of metacognitive strategies like rehearsal.

Effective strategies for remembering lists

Forming visual images- picturing a MOUNTAIN of APPLES or a COAT made of PAPER

Categorizing the items- grouping POTATO with APPLE because they are both foods or, SINK with SOAP because they are found together

Making a story- I'm going to visit a friend on a MOUNTAIN so I'll wear my COAT and take an APPLE for a snack

Effective strategies for remembering text information

Identify important information

Organize information

Take notes in your own words

Make sure you understand before you try to memorize something

Use mnemonics like acronyms, acrostics and imagery

Summary Writing

Self-management steps

Make sure you understand the text. Ask yourself, "what was this text about? What did the writer say?" Try to say the general idea or theme to yourself.

Look back. Reread the text to make sure you got the theme right. Make sure you understand the important parts. You might even put a star by the important parts or highlight them with a marker.

After you write your summary:

Rethink. Reread a paragraph of the text. Try to say the theme of that paragraph to yourself. Is the theme a topic sentence? Did you identify it before? Is the topic sentence missing? Did you create one?

Check and double check. Did you leave in any unnecessary lists? Did you repeat yourself? Is all the important information in the summary. Make sure it is.

Summarization rules

Collapse lists. If you see a list of things, try to think of a word or phrase that names the whole list. For example, if you saw a list like American Express, Visa, Mastercard and Universal Card, you could collapse the list by saying credit cards.

Get rid of unnecessary information. Sometimes information is repeated in a passage and sometimes information may be included that is not really important. Because summaries are meant to be short, you should get rid of repetitious and unimportant information.

Use topic sentences. Authors may write a sentence that summarizes a whole paragraph. This is called a topic sentence. If the author gives you one, use it but write it in your own words. Many times there won't be a topic sentence and you will have to make one up.

Collapse paragraphs. Paragraphs in a passage are usually related to one another however some paragraphs are necessary when others are not. Some paragraphs simply explain another paragraph or offer more detail. Decide which paragraphs should be kept, which should be left out, and which should be joined together.

Locating information in a table

Goal formation. Decide what table you need to look at. What is it you need to know?

Category selection. Use row and column headings and subheadings to decide what categories of information you need to look at.

Selective inspection. Find the specific information you need. You can save a lot of time if you know where you need to look.

Questions: Can I use memory devices effectively?
Am I able to write an effective summary?
Can I locate information in a table? in a table of contents? on a chart?

Student Guide

UNIT 5 Oral Communication

Main Points:

What skills and strategies that important in effective oral communication?
To demonstrate effective strategies for giving and receiving information.

Purpose:

To increase awareness of the strategies involved in effective communication.
To provide practice in using effective strategies to improve oral communication.

Definitions: **Communication** is the transfer of information or ideas.

Oral Communication is the transfer of information or ideas through speaking and listening.

Consider:

A good communicator needs to be sensitive to his/her audience. Ask yourself:

What do they need to know? How much information should be provided?
What is the current level of knowledge about the topic? How much do they already know?
What will the audience be able to understand and state it clearly and consisely?

Questions:

Monitor your understanding of oral communication by asking yourself these questions:

Do I understand what was said?
Do I remember what was said?
Does it make sense?
Can it be done?

UNIT 6 Written Communication

Main Points:

What are the processes in written communication?
What are the questions for evaluating written communication?

Purpose:

To increase awareness of the strategies involved in effective communication.
To provide practice in using effective strategies to improve written communication.

Definitions: **Planning** is the generating and organizing of ideas as well as goal setting.

Translating is the process of putting one's ideas into words and then writing those words down.

Revising is the process of examining and improving one's own writing.

Questions:

Use these questions to evaluate your writing during revision:

Are there any words that aren't used or spelled correct?
Are there sentences that are not grammatical or correctly punctuated?
Are there any factual errors or information that doesn't fit with what I already know?
Are there references to people or things that are ambiguous, where it isn't clear who or what is being talked about?
Are the ideas presented in a well organized way?
Are there any ideas that seem contradictory or illogical?
Is there any information missing or not clearly explained?
Is the writing sensitive to the needs of the audience in tone and complexity?

Student Guide

UNIT 7 Problem Solving and Decision Making

Main Points:

What are the steps in problem solving and decision making?
How do you apply these steps in solving a problem?

Purpose:

To introduce steps involved in solving a problem.
To introduce strategies for problem solving.
To provide practice for using problem solving strategies.

Definitions: **Algorithm** is a set of step-by-step rules used to solve a problem or make a decision.

Heuristic is a rule of thumb usually developed by experience.

* Heuristics can save time but algorithms, if used properly, will always provide the correct solution.

The Problem Solving Process

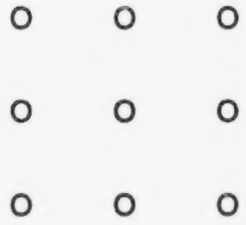
Define the problem - become aware of a problem and identify the problem

Obtain facts - generate and evaluate alternatives

Plan how you will solve the problem - Choose the best alternative

Attempt to solve the problem - Implement the approach

Evaluate your progress - use feedback to evaluate progress



Student Guide

UNIT 8 Math Problem Solving

Main Points:

What standards or criteria should be used to monitor progress in solving math problems?
What are the steps to take in solving math problems?
What are the questions for evaluating mathematical problem solving?

Purpose:

To increase awareness of the need to monitor progress in solving math problems.
To provide strategies for evaluating the effectiveness of approaches to solving math problems.
To provide strategies for solving math problems more effectively.

Definitions:

Steps for Solving Math Problems

Read the problem. Monitor your comprehension, just as you do when reading other kinds of materials. Comprehension monitoring questions are appropriate here.

Decide how to solve it. You need to think about what the problem is asking and make several kinds of decisions, such as what operation is appropriate.

Solve it. Simply perform the calculations you decided were necessary.

Examine to see if the answer is sensible. Not only should you check to see if the calculations are correct, but also be sure that your solution makes sense and is the best solution possible under the circumstances.

Strategies for Analyzing problems

Look for similarities with familiar problems.

Make a drawing to represent the problem.

Estimate what you think the answer should be.

The Value of Estimation

We can make an intuitive estimate of the answer and then check the solution against the estimate.

We are able to determine if a solution on a calculator makes sense or if we punched in the wrong numbers.

Estimation allows us to reason about logical and numerical relations without the "clutter" of fractions and decimals.

Estimation lets us work out solutions with whole numbers instead of decimals and fractions.

Estimation Strategies

Change the problem by making it into a simpler one.

Simplify the problem by eliminating decimals and rounding to the nearest five or ten's place.

Convert the problem into one involving well known number facts. An example is multiplication by 10.

Questions:

Ask these five questions to decide whether the approach you took to problem solving was in fact the best approach and to help you monitor your progress.

1. Can the problem be solved with the amount of information available?
2. Did I choose the correct procedure(s) for solving the problem?
3. Are the calculations correct?
4. Does the solution make sense?
5. If there is more than one correct answer, is this the best possible solution?

TRANSPARENCIES

Course Outline

Sales & **C**ustomer **S**ervice **O**ccupational **R**eadiness **E**ducation

Introduction To Metacognition

The Personal Side Of Learning

Reading Comprehension and Comprehension Monitoring

Computer Access And Hardware Familiarity

Vocabulary Master-Computer Terms

Computer **B**ased **T**raining Introduction

Vocabulary Master-Customer Service Terms

Transparency 1.1

Course Outline (cont.)

Remembering And Locating Information

CBT Module 2, Information Sharing

Oral Communication

CBT Module 3, Simple Customer Contact

Written Communication

CBT Module 4, Complex Customer Contact

Problem Solving and Decision Making

Mathematical Problem Solving

CBT Module 5, Sales

What is Metacognition?

Metacognition is the knowledge an individual has about his/her own learning and cognitive processes and the control of those processes.

Cognition is the mental activity that leads to learning.

Metacognition has two components:

(1) Knowledge about cognition

Knowledge about the skills, strategies and resources that are needed to perform a task effectively

(2) Regulation of cognition

The ability to use self-regulatory strategies to make sure the task is completed successfully, including:

(a) planning
(b) evaluating
(c) monitoring
(d) checking
(e) self-testing
(f) revisiing

Transparency 1.2

The "Personal Side" of Learning and Performance

The "personal side" of learning and performance refers to:

1. Personal characteristics of the self such as motivations, attitudes, feelings and self-confidence

2. One's personal style of dealing with different kinds of situations, such as setting goals, seeking feedback and being persistent

Transparency 1.3

Hey man,

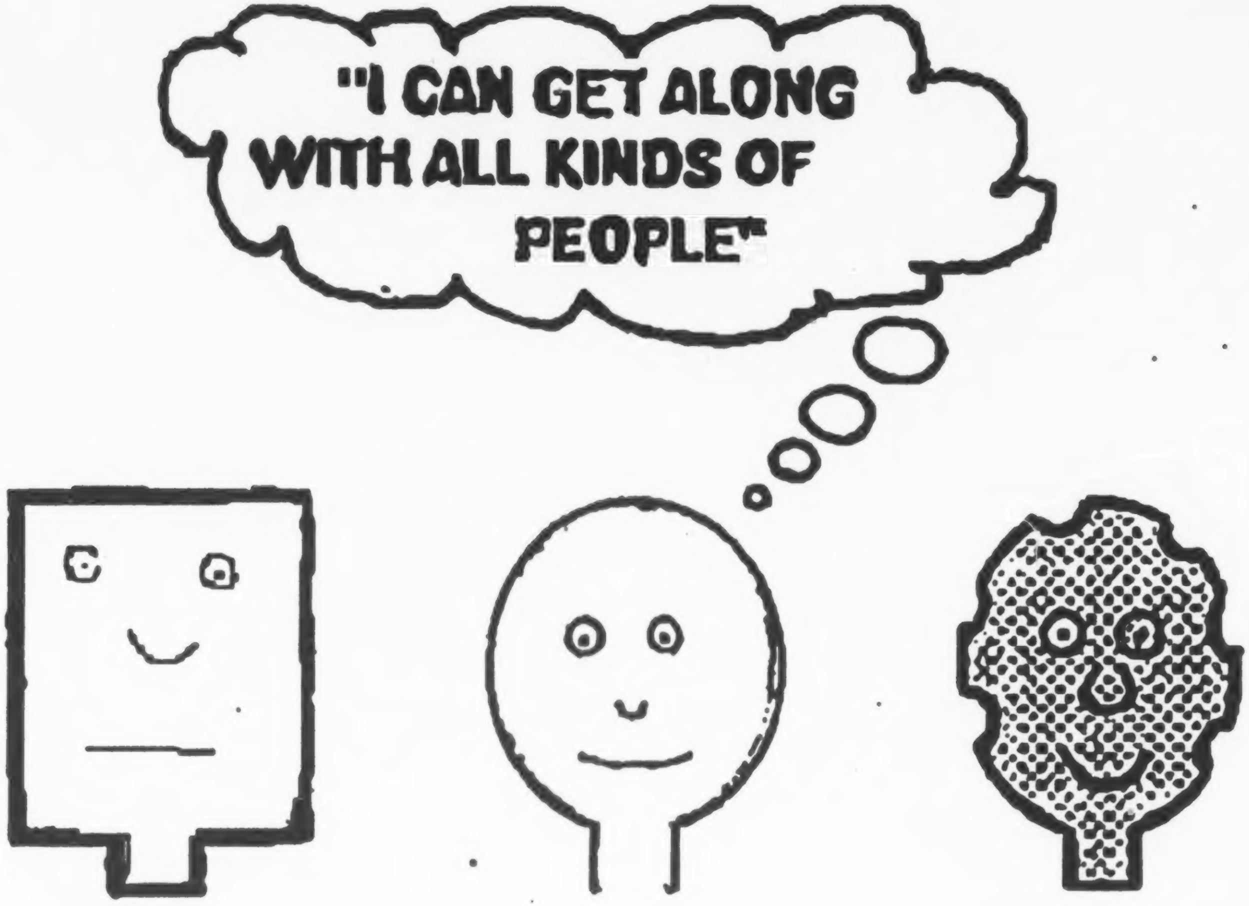
it's not

my job.

Transparency 2.1

A FAILURE
TO **PLAN** ON
YOUR PART
DOES NOT
CREATE AN
EMERGENCY ON
MY PART!

Transparency 2.2


"I CAN GET ALONG WITH ALL KINDS OF PEOPLE"

Transparency 23

Personal Characteristics That Affect Performance

GOAL SETTING

Set specific and challenging goals
Get feedback
Set mastery goals

ATTRIBUTIONAL STYLE

Focus on improvement
Blame failure on effort and approach
Believe ability is trainable

PERSISTENCE

Work hard
Continue in the face of adversity
Try different approaches

SELF-EFFICACY

Believe in your ability to control events
Accentuate the positive

Transparency 2.4

Tips for Top Performance

Take time for planning

Be sensitive to feedback

Develop skills and knowledge to work with confidence

Use your time wisely

Transparency 2.5

Daily To-Do List

1. Write weekly sales report
2. Call back 3 clients
3. Work on proposal for Emerson contract
4. Make calls to potential clients

Transparency 2.6

Detailed To-Do List

1. Write weekly sales report
    - A. Assemble list of sales made by day of the week--note product sold, quantity and amount of sale
    - B. Organize list by product sold
    - C. Determine amount of merchandise sold by department
2. Call back 3 clients

▪

▪

Transparency 2.7

Comprehension Monitoring

(1) **Evaluation,** keeping track of your own ongoing efforts to understand

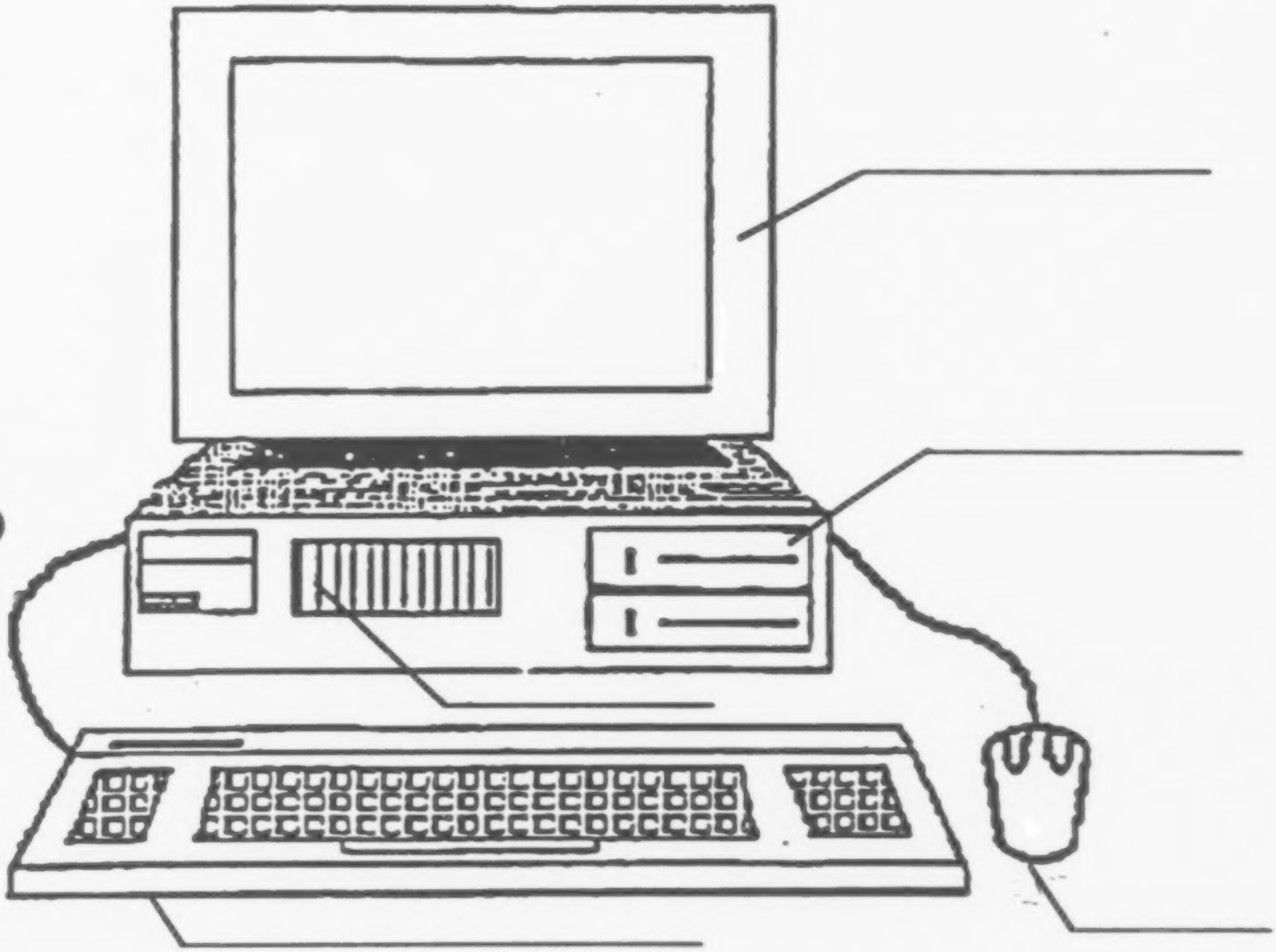
(2) **Regulation**, taking appropriate steps to deal with whatever difficulties arise

Transparency 3.1

Questions for Evaluating Understanding

1. Are there any words I don't understand ?
2. Are there any ideas that don't fit with what I already know?
3. Are there any ideas that don't fit together because I can't tell who or what is being talked about?
4. Are there any ideas that don't fit together because I can't tell how the ideas are related?
5. Are there any ideas that don't fit together because I think the ideas are contradictory?
6. Is there any information missing or not clearly explained?

Transparency 3.2



Transparency S.1

MONITOR

DISK DRIVE
or
FLOPPY DRIVE

HARD DRIVE

KEYBOARD

MOUSE

Transparency S.2

Memory for Many Digits

902825552387303555873824669

Chunking Digits

9 - 0 - 282 - 555-2387 - 303 - 555-8738 - 2469

Meaningful Units

9	to get an outside line
0	to use a calling card
282	area code of person being called
555-2387	number of person being called
303	caller's area code
555-8738	caller's phone number
2469	caller's calling card number (PIN)

Transparency 4.1

Exercise for Summarization

Rule #3: Use topic sentences.

4. The Green Machine Lawn Care Team offers several options to its customers. Customers can choose the traditional weed-killing formula or the all-natural, vegetable based weed-killing formula. The team will visit customers' lawns every other day, once a week, every other week or once a month. Customers may also decide to use our individualized care plan for optimal maintenance of their lawns.

5. The Model 286 Custom Copier can make copies in black and white or in full color. It can make copies on two sizes of paper, either 8" x 10" or 11" x 14", and it can reduce or enlarge the copy from 10% to 70% of the original.

Transparency 4.10

Transparency 4.11

Table 4.3
Real Estate Information Table

Model Name	No. of Levels	Living Areas	Sleeping Areas	No. of Baths	Kitchen Options	Living Room Options	External Options
Maryland	2	Living Rm Family Rm	1 Master 2 Other	2-1/2	Cooking Island Indoor BBQ	1 Fireplace	Attached Patio 2-Car Garage Fence
Connecticut	3	Living Rm Family Rm	2 Master 3 Other	3	Separate Freezer Cooking Island	2 Fireplaces Wet Bar	Separate Patio Car Port Fence
Virginia	1	Living Rm	1 Master 2 Other	1-1/2	Built-in Microwave Breakfast Nook	Built-in Bookcase	1-Car Garage
Carolina	3	2 Living Rms Family Rm Basement	3 Master	4-1/2	Cooking Island Indoor BBQ Separate Freezer	2 Fireplaces Wet Bar	2-Car Garage Inground Pool Attached Patio
Florida	2	Living Rm Family Rm	1 Master 3 Other	2	Built-in Microwave Cooking island	1 Fireplace Conversation Pit	Separate Patio 1-Car Garage
Pennsylvania	1	Living Rm Family Rm	1 Master 1 Other	1-1/2	Indoor BBQ Breakfast nook	Wet Bar	Car Port Attached Patio

Notes

Rm stands for Room.
All Family Rooms are 22' x 30'.
All Living Rooms are 34' x 50'.
All fences are made of Stainless Steel.
Master Bedrooms have Attached Bathrooms.
Cooking Islands come in Tile or Brick Finish.

Memory for Letters

G M C B S I B M A T T C I A F B I

Chunking Letters

GM - CBS - IBM - ATT - CIA - FBI

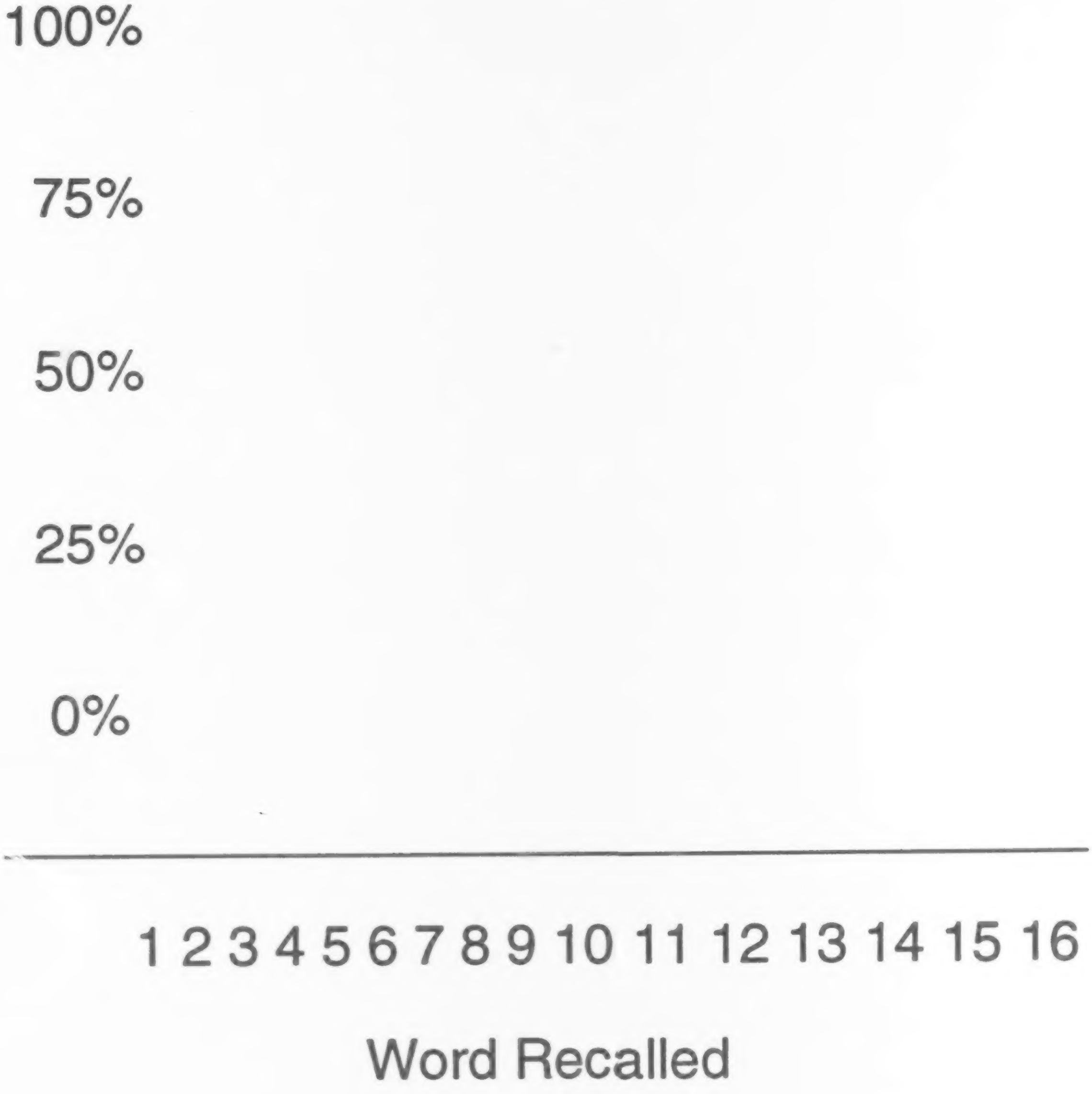
Transparency 4.2

List of Words to be Recalled

1. Mountain
2. Apple
3. Coat
4. Paper
5. Brush
6. House
7. Sink
8. Hammer
9. Customer
10. Tree
11. Radio
12. Train
13. Chair
14. Potato
15. Rock
16. Soap

Transparency 4.3

Results of Memory Exercise



Transparency 4.4

Effective Strategies for Remembering Lists

Forming visual images- picturing a MOUNTAIN of APPLES or a COAT made of PAPER

Categorization- grouping POTATO with APPLE because they are both foods, or SINK with SOAP because they are found together

Making a story- such as, I am going to visit a friend who lives on a MOUNTAIN, I will take an APPLE for a snack and wear my COAT

Less effective but they may work:

Repetition- repeating over and over and over

Alphabetizing-putting the items on a list in alphabetical order

Transparency 4.5

Effective Strategies for Remembering Text Information

Identify important information

Organize information

Take notes in your own words

Understand something before you try to remember it

Use mnemonics (memory aids)

*acronyms

*acrostics

*imagery

Transparency 4.6

Self-management Steps

1. **Make sure you understand the text.** Ask yourself, "What was this text about? What did the writer say?"

2. **Look back.** Reread the text to make sure you got the theme right. Make sure you understand what the important parts are.

Write your summary using the rules for summarization, then:

3. **Rethink.** Try to say the theme of the paragraph to yourself. Is the theme a topic sentence? Did you identify it before? Is the topic sentence missing? Did you create one?

4. **Check and double check**. Did you leave in unnecessary lists? Did you repeat yourself? Is all the important information there?

Transparency 4.7

Summarization Rules

1. **Collapse lists.** If you see a list of things, try to think of a word or phrase that names the whole list.

2. **Get rid of unnecessary information.** Take out any information that is repeated or simply unimportant. Keep your summary short.

3. **Use topic sentences.** Sometimes authors summarize a whole paragraph for you in a topic sentence. If there is one, use it but in your own words. If there isn't a topic sentence, write one.

4. **Collapse paragraphs.** Paragraphs in a passage are usually related but some are more important than others. You should keep the important ones, eliminate the unnecessary, and join the rest together.

Transparency 4.8

Exercise for Summarization

Rule #1: Collapse lists.

1. The Rent-Our-Stuff company has offices in Delaware, Maryland, Virginia, North Carolina and South Carolina.

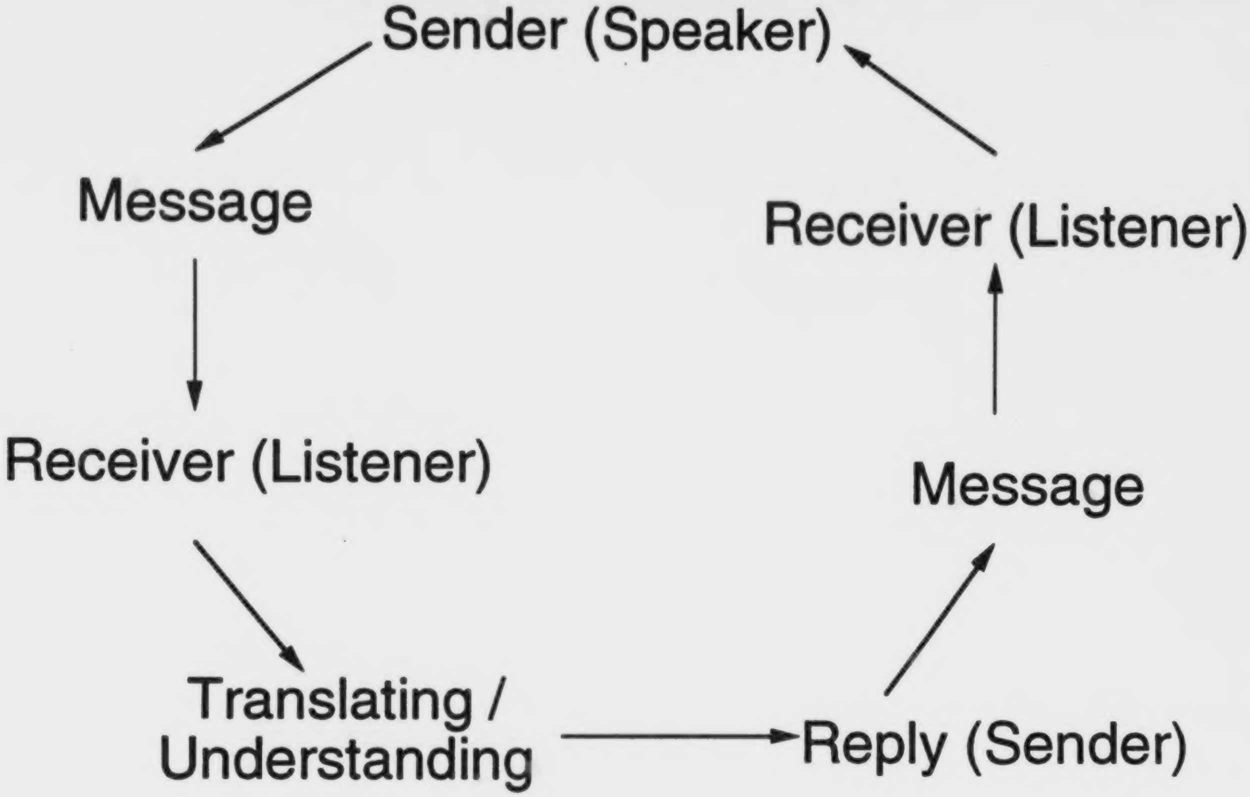
2. In order to purchase items from the Premiere Catalog, customers must call the 1-800 toll free number, tell the clerk that they want to place an order, then give the clerk the page number, item number, item description and item price.

Rule #2: Get rid of unnecessary detail.

3. The office complex has six four-story buildings. Each building has its own parking facilities, several elevators and a small cafeteria. The buildings were designed to make access easy for people in wheelchairs. Each parking lot has several clearly marked handicap spaces, and there are wheelchair ramps and automatic doors at each building. The complex also has impressive landscaping details. The area boasts beautiful oak and maple trees. Flower gardens and shrubbery border each building.

Transparency 4.9

The Communication Process


Sender (Speaker)

Message

Receiver (Listener)

Translating / Understanding

Reply (Sender)

Message

Receiver (Listener)

The Communication Exchange

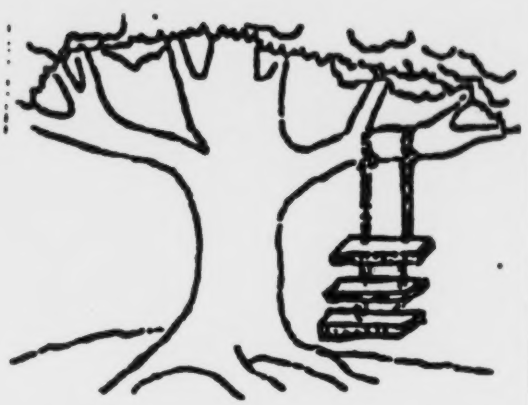
Speaker's Role

- * Select Topic
- * Analyze Audience
- * Plan Message
- * Send Message
- * Encourage Listener Response

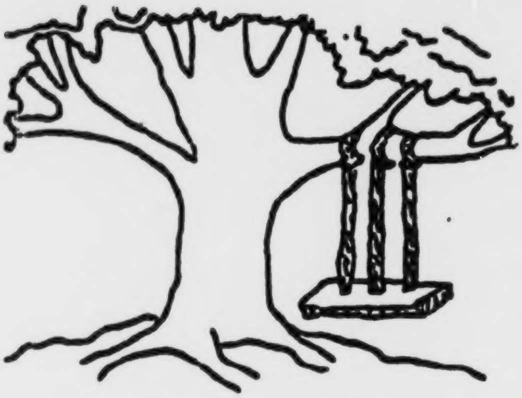
Listener's Role

- * Listen Actively
- * Receive Message
- * Translate Message
- * Respond to Message

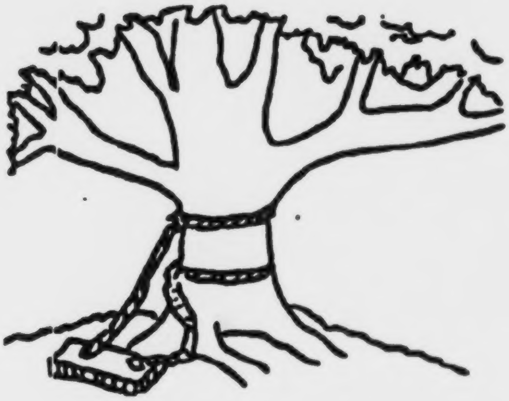
Transparency 5.1



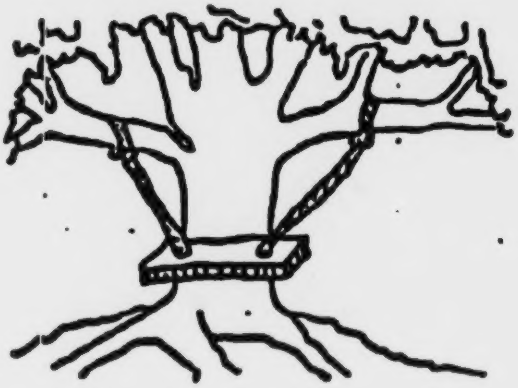
As it was requested by marketing



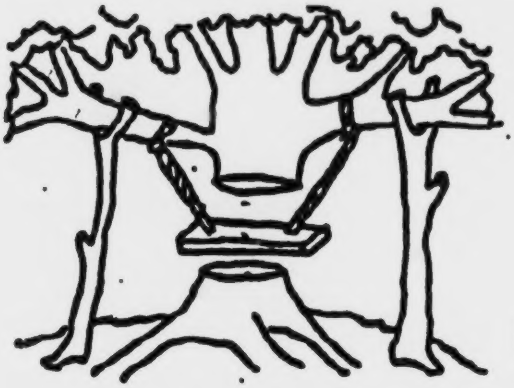
as designed by the engineer



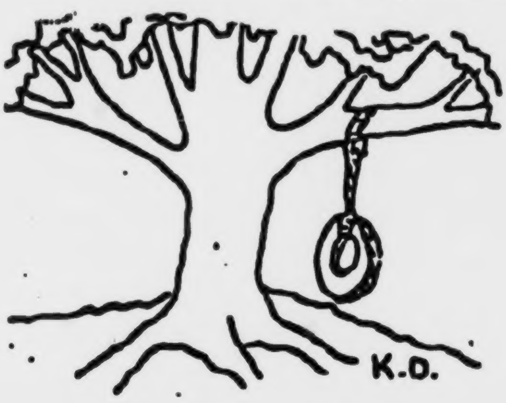
as ordered by sales



as it was manufactured by productions



as the physical plant installed it



What the Customer wanted

Transparency 5.2

Processes in Writing

1. Planning

(a) generating ideas
(b) organizing ideas
(c) setting goals

2. Translating

(a) putting one's ideas into words
(b) writing the words down

3. Revising

(a) self-evaluating
(b) self-editing

Questions for Evaluating One's Writing

1. Are there any words that aren't used or spelled correctly?

2. Are there sentences that are not grammatical or correctly punctuated?

3. Are there any factual errors or information that doesn't fit with what I already know?

4. Are there references to people or things that are ambiguous, where it isn't clear who or what is being talked about?

5. Are the ideas presented in a well organized way?

6. Are there any ideas that seem contradictory or illogical?

7. Is there any information missing or not clearly explained?

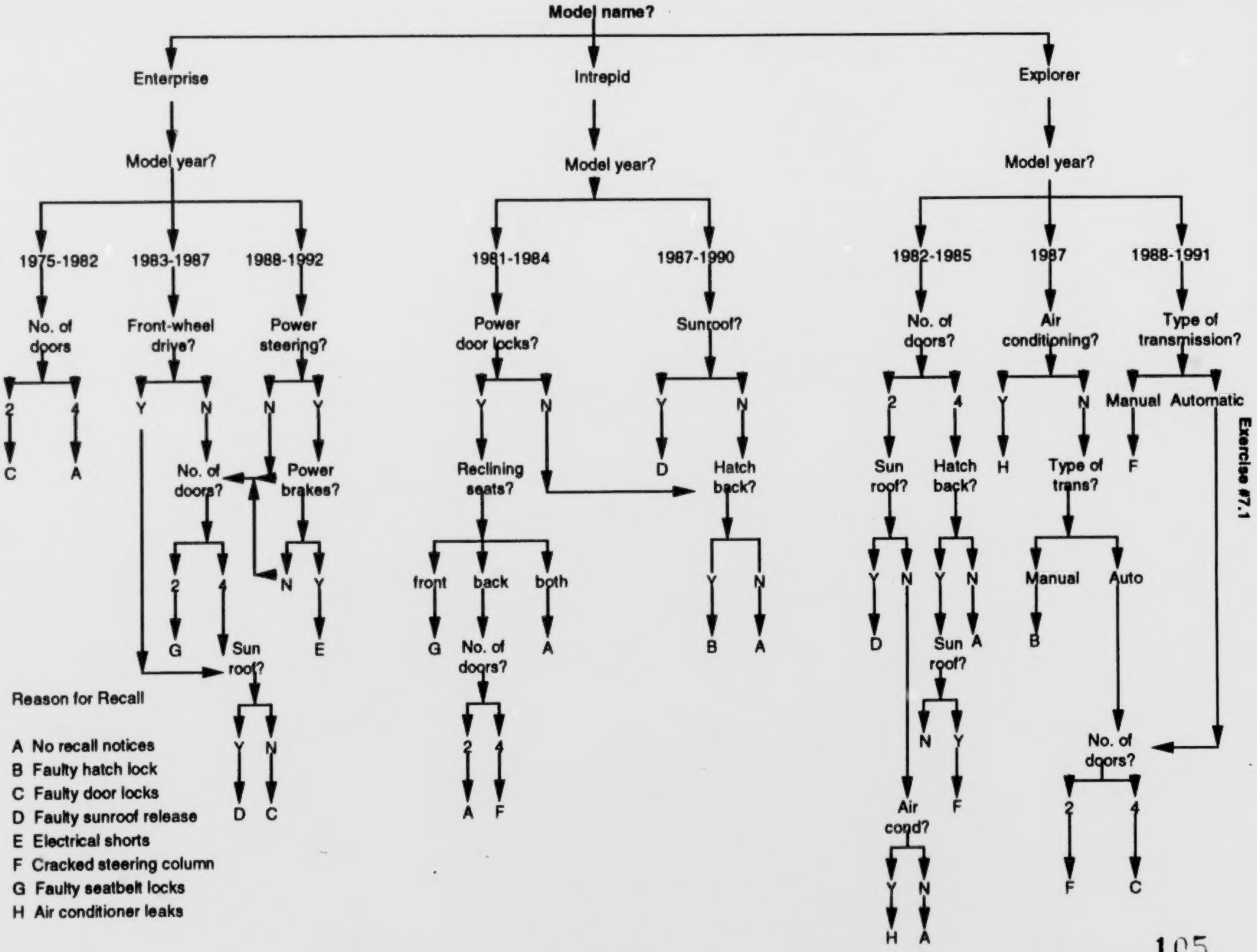
8 Is the writing sensitive to the needs of the audience in tone and complexity?

Transparency 6.2

Business Letter Format

1. My U.S.A. Company My Home Street Home City, Home State, 00000-0000	[Heading]
2. February 11, 1994	[Date]
3. Mr. American Businessperson 1 Main Street Any City, Any State, 00000-0000	[Inside] [Address]
4. Dear Mr. Businessperson:	[Salutation]
5. You spoke with a customer service representative concerning a problem with your account. This letter describes a solution to your problem.	[Opening] [Paragraph]
6. You said you lost your card. You must write a letter to us with your account number, the date the card was lost, and a description of the last purchase you made with the card. We will take appropriate action then.	[Explanatory] [Paragraph]
7. Thank you for bringing this problem to our attention. We hope it has not caused you too much inconvenience.	[Closing] [paragraph]
8. Sincerely yours,	[Complimentary] [Closing]
9. John or Jane Doe Customer Service Representative	[Signature] [Line]

Transparency 6.3


Model name?
Enterprise
Intrepid
Explorer
Model year?
1975-1982
1983-1987
1988-1992
No. of doors
2
4
C
A
Front-wheel drive?
Y
N
No. of doors?
2
4
G
Sun roof?
Y
N
D
C
Power steering?
N
Y
Power brakes?
N
Y
E
Model year?
1981-1984
1987-1990
Power door locks?
Y
N
Reclining seats?
front
back
both
G
No. of doors?
2
4
A
F
A
Sunroof?
Y
N
D
Hatch back?
Y
N
B
A
Model year?
1982-1985
1987
1988-1991
No. of doors?
2
4
Sun roof?
Y
N
D
Air cond?
Y
N
H
A
Hatch back?
Y
N
Sun roof?
N
Y
F
A
Air conditioning?
Y
N
H
Type of trans?
Manual
Auto
B
Type of transmission?
Manual
Automatic
F
No. of doors?
2
4
F
C

Reason for Recall

A No recall notices
B Faulty hatch lock
C Faulty door locks
D Faulty sunroof release
E Electrical shorts
F Cracked steering column
G Faulty seatbelt locks
H Air conditioner leaks

104

105

Define the Problem

Simplify the problem and represent it concretely

- -represent it internally (picture it in your mind)

- -represent it externally (write it down)

Reconsider the problem

Redefine the problem

Avoid jumping to conclusions

Transparency 7.2

Monthly Budget Facts

Mr. Brown spends more on rent than on movies.

Mr. Brown spends more on books than on records.

Mr. Brown spends less on books than on movies.

Mr. Brown spends less on rent than on clothes.

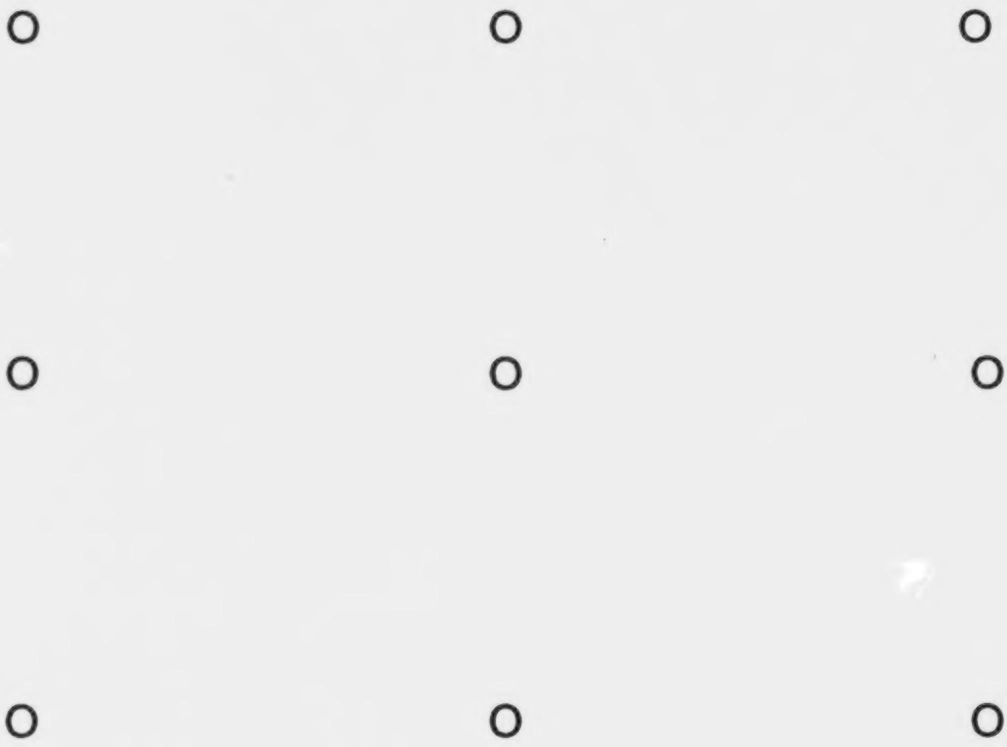
Mr. Brown spends more on records than on food.

What is Mr. Brown's largest monthly expense and what is his smallest monthly expense?

Consider external representation.

Transparency 7.3

Connect the Dots



Transparency 7.4

The Bank Account Problem

A new bank is offering a special account which doubles your money every twenty-four hours. On the day the account is opened, you deposit $1. It takes 60 days for you to reach the amount you want to have in your account. On what day is your account half full?

Transparency 7.5

Obtain Facts

Consider what options are available

Have you experienced a similar problem?

Has someone else experienced the same problem?

Determine what resources are available

Transparency 7.6

Plan How You will Solve the Problem

Spend time planning

Break down the problem

Use algorithms - step-by-step rules

Use heuristics - rules of thumb

No one intentionally makes a bad decision- we always make the best decision based on what we know at the time.

Transparency 7.7

Attempt to Solve the Problem

Implement your best alternative

Evaluate your Progress

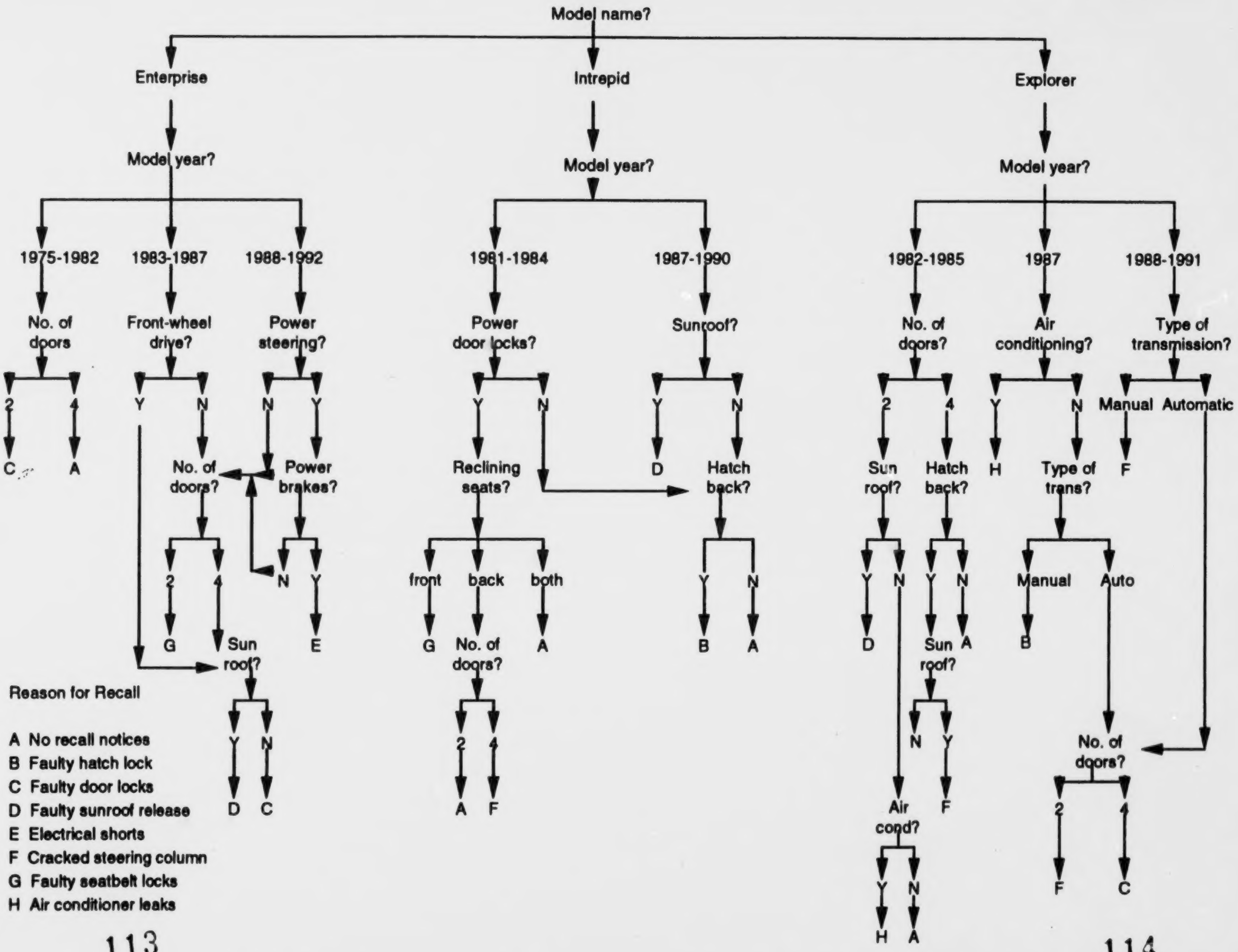
Consider other solutions

Get external feedback

Don't get stuck with one way of thinking

Consider something unusual

Transparency 7.8


Model name?
Enterprise
Intrepid
Explorer
Model year?
Model year?
Model year?
1975-1982
1983-1987
1988-1992
1981-1984
1987-1990
1982-1985
1987
1988-1991
No. of doors
Front-wheel drive?
Power steering?
Power door locks?
Sunroof?
No. of doors?
Air conditioning?
Type of transmission?
2
4
Y
N
N
Y
Y
N
Y
N
2
4
Y
N
Manual
Automatic
C
A
No. of doors?
Power brakes?
Reclining seats?
D
Hatch back?
Sun roof?
Hatch back?
H
Type of trans?
F
2
4
N
Y
front
back
both
Y
N
Y
N
Y
N
Manual
Auto
G
Sun roof?
E
G
No. of doors?
A
B
A
D
Sun roof?
A
B
Y
N
2
4
N
Y
No. of doors?
D
C
A
F
Air cond?
F
2
4
Y
N
F
C
H
A

Reason for Recall

A No recall notices
B Faulty hatch lock
C Faulty door locks
D Faulty sunroof release
E Electrical shorts
F Cracked steering column
G Faulty seatbelt locks
H Air conditioner leaks

Transparency 7.9

Steps for Solving Math Problems

1. Read the problem
2. Decide how to solve it
3. Solve it
4. Examine to see if the answer is sensible

Transparency 8.1

Questions for Evaluating Math Problem Solving

1. Can the problem be solved with the amount of information available?
2. Did I choose the correct procedure(s) for solving this problem?
3. Are the calculations correct?
4. Does the solution make sense?
5. If there is more than one correct answer, is this the best possible solution?

Transparency 8.2

The Refreshment Problem

Your company has just developed a major new line of insurance services. Your supervisor has scheduled a meeting with 50 representatives from various independent insurance agencies to tell them about the new line of services.

You are asked to assist in arranging refreshments for the meeting. You decide to serve coffee and Danish coffee cake.

The bakery tells you that each cake serves 8 people. How many cakes should you buy?

Transparency 8.3

The Copier Problem

You work for a company that sells photocopying machines. A customer calls you and says she is interested in purchasing one for her office. She needs to know whether your machine will fit in the space she has available.

Here are the facts:

1. The copier is 50" long, 24" wide, and 45" high.

2. The machine must fit along one wall in the office. The wall is 10 feet long. A window is centered in the wall space. The window is 5 feet by 5 feet with the sill 3 feet from the floor.

Will the machine fit lengthwise along the wall? What do you tell the customer? Are there any unusual solutions?

Transparency 8.4

HANDOUTS

SCORE

Sales & Customer Service Occupational Readiness Education

Course Outline

Introduction To Metacognition

The Personal Side Of Learning

Reading Comprehension and Comprehension Monitoring

Computer Access And Hardware Familiarity

Vocabulary Master- Computer Terms

Computer Based Training Module 1, Introduction

Vocabulary Master- Customer Service Terms

Remembering And Locating Information

CBT Module 2, Information Sharing

Oral Communication

CBT Module 3, Simple Customer Contact

Written Communication

CBT Module 4, Complex Customer Contact

Problem Solving and Decision Making

Mathematical Problem Solving

CBT Module 5, Sales

Metacognitive Knowledge and Skills to Improve Learning

There are many different reasons why reading material may be hard to understand and it is helpful for you to be aware of them as you read. You may not be familiar with the vocabulary; the text may not be written clearly; or the author may not include enough information about a topic that is new to you. The lessons to be presented are designed to help in the understanding and use of these and other skills.

1. There are several things you can do when you don't understand what you are reading; you can reread, look ahead, use context clues and ask another person for help.

2. It is useful to think about what you already know to understand information that is new.

3. It is important to know how well you understand what you are reading and to know when you are ready to use it to take a test or perform a task.

4. There are several strategies you can use to to evaluate your understanding of what you are reading. Paraphrasing or summarizing material will help you test your understanding. If you can remember something in your own words, it usually means that you understand it.

5. People read for different purposes and the reading strategies you use should match your purpose for reading. Scanning is appropriate if you are looking for a specific fact but it would not be appropriate if you need a detailed understanding of the whole passage.

6. There are also many strategies for studying but not all are effective. Reading and rereading are not always enough; you need to self-test and take an active role.

7. Effective self testing means thinking of good questions to ask yourself, identifying the main ideas, and determining what is essential (needed) information.

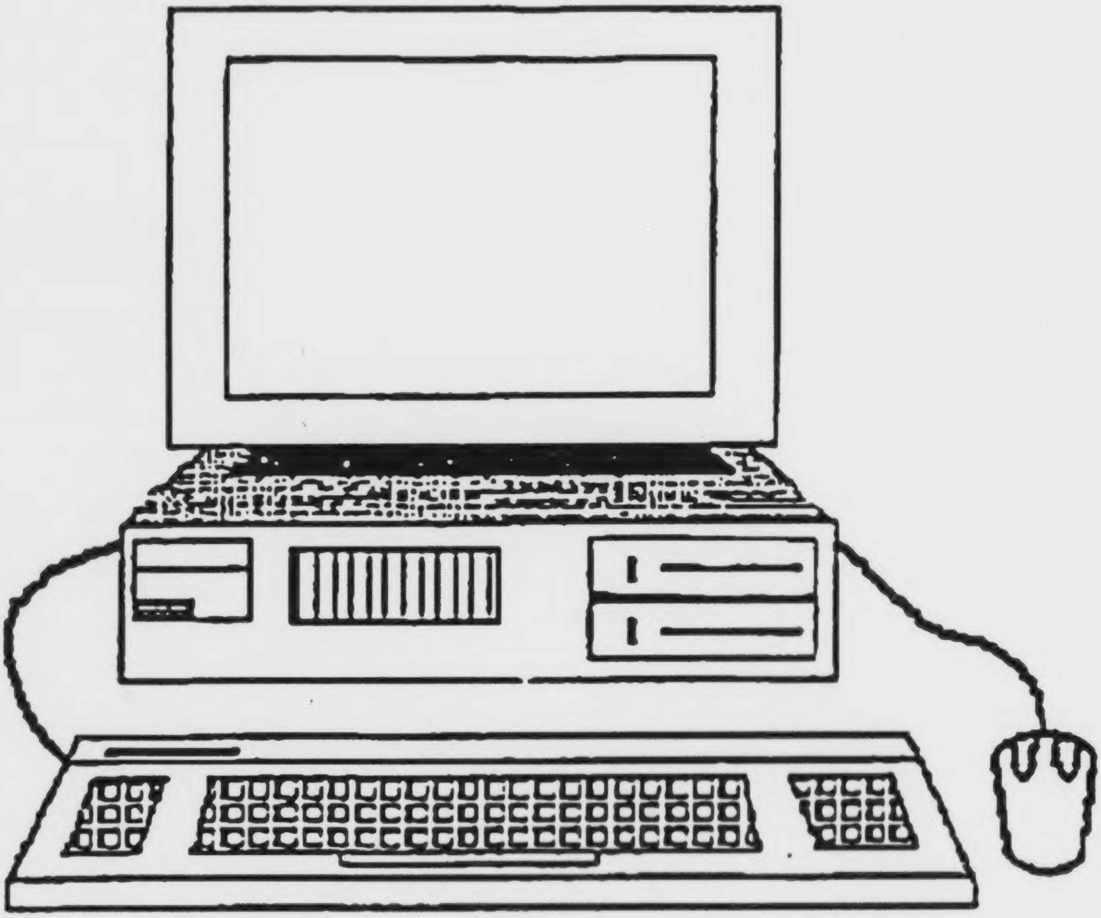
8. It is important to set aside the proper amount of study time and to focus on what you most need to know,

9. Many of the metacognitive strategies that are important in reading are also important in listening. You need to monitor your understanding of oral messages, so you will know when you don't understand what is being said.

10. Planning and checking are important metacognitive control strategies.

11. Once a task is completed, it is important to evaluate how well you handled it.

Identifying Parts of the Computer

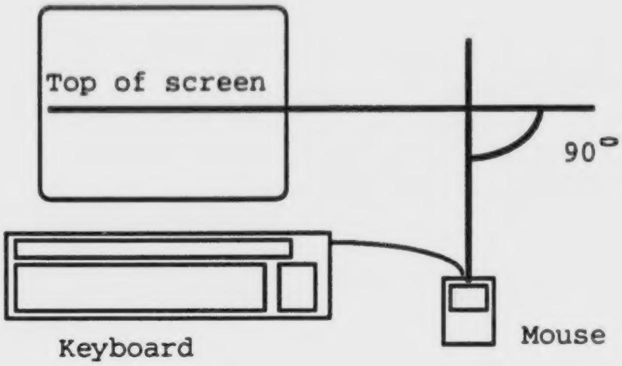


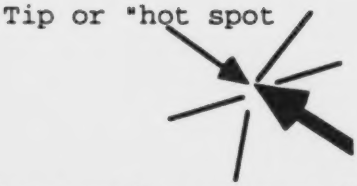
Can you identify the *Monitor*, *Hard Disk*, *Floppy Drive*, *Keyboard* and *Mouse*?

The **C**omputer **B**ased **T**raining will provide an introduction to the computer and the courseware however there are some basics you need to know in order to start the program.

Using the Mouse

The way you hold a mouse is very important. Be sure you hold the mouse *perpendicular* (at right angles) to the screen.

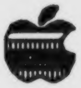




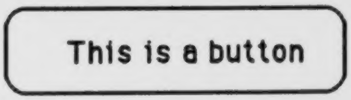
This is an enlarged view of the mouse pointer. The tip of the mouse is sometimes called the "hot spot" because it is the area of the pointer that must be placed on the object to click on it or drag it.

Click	to press the button one time.
Double click	to press the mouse button twice quickly.
Drag	move the tip of the mouse pointer on top of the item to be moved, then press and hold the mouse button down. Without releasing the button, move the item to the desired location by moving the mouse. When the item is placed correctly, let go of the button.

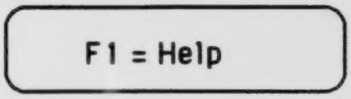
Clicking on icons or buttons wiill be performed often. To use an icon or button, move the tip of the pointer on top of the button, then clicking and releasing the mouse button in a smooth motion. Some buttons have a keyboard equivalent that lets you use the keyboard in place of the mouse. In the example, pressing function key **F1** will cause the same effect as clicking on the button.



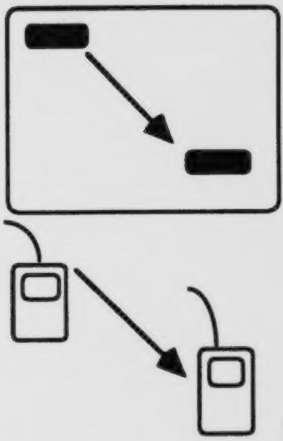
Icon



button



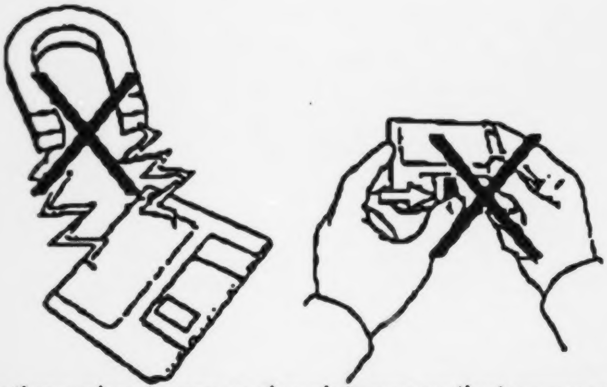
keyboard equivalent



Drag from here to here!

Notice how the object movement parallels mouse movement.

Diskette Care

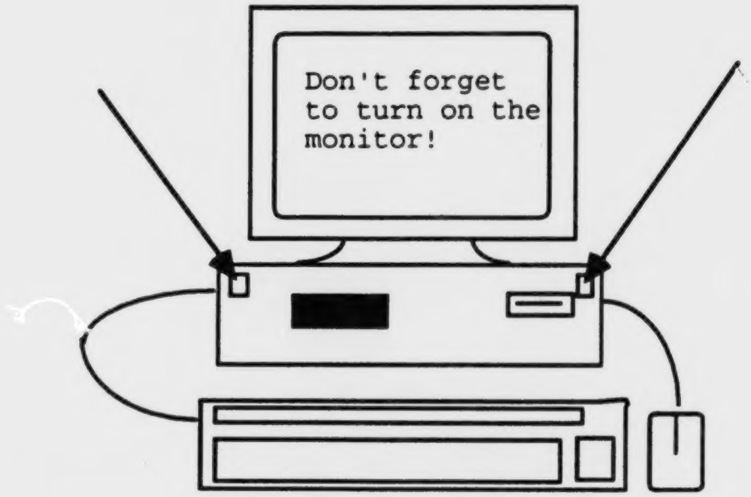


Follow the instructions about care and maintenance that came with your disks. At minimum, remember these three points:

- Keep the disks away from magnets. Information on the disks is saved in the form of magnetic signals, so a magnetic field can destroy that information. Televisions, monitors, telephones, loudspeakers and certain kinds of lighting fixtures all have magnets.
- Protect disks from extremes of temperature and humidity.
- Do not open the disks metal shutter. Touching the disk inside the shutter could damage it.

Using an IBM Computer

Some computer systems are on networks and require special power up sequences, they may require one or two passwords. Since it is impossible to describe all the possibilities here, a general sequence for a stand alone system is provided. A little practice will go a long way, the windows environment has a lot of features and if several people are using the system, the screen may look different each time you turn it on. Simply knowing the name of the program group you use will enable you to find your application quickly and easily.

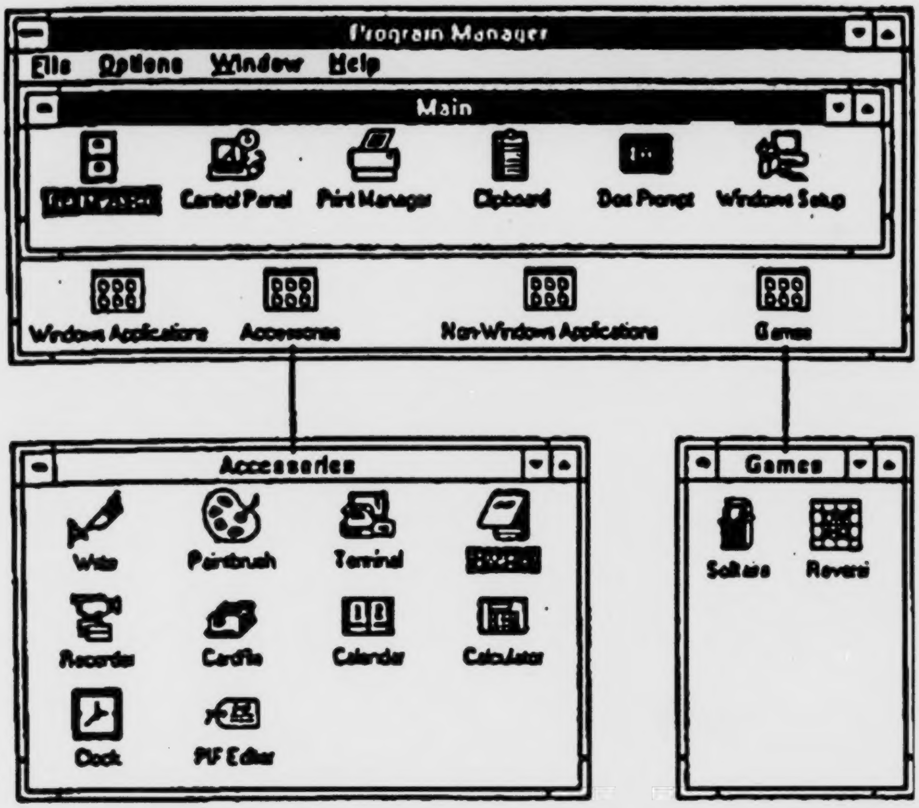


Turn on your system in the following manner:

1. Turn on the monitor first.
2. Turn on any *peripherals* (printer, external drives).
3. Turn on the computer. The illustration indicates two possible locations for the ON/OFF switch, however it may be on the side or in the back of the computer.
4. Start **Windows**.

Handout #S2 cont.

The Basic Elements of Windows


Program Manager
File
Options
Window
Help
Main
Control Panel
Print Manager
Clipboard
Dos Prompt
Windows Setup
Windows Applications
Accessories
Non-Windows Applications
Games
Accessories
Write
Paintbrush
Terminal
Recorder
Cardfile
Calendar
Calculator
Clock
PIF Editor
Games
Solitaire
Reversi

The appearance and contents of the Windows Applications and Non-Windows Applications groups depend on your choices during setup.

All Windows operations take place within the framework of the desktop, the screen space Windows occupies. You can think of this space as the surface area of an actual desk. You can move the items around on the desk, bring new ones on to it, and remove the items you won't need for a while.

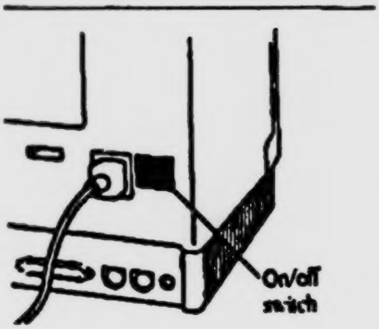
Using the mouse, move the hot spot of your pointer to the icon (picture) that represents the application you want to use. Double click the mouse button. The program should start. Now you can follow the on screen instructions that are part of your application.

Using a Macintosh Computer

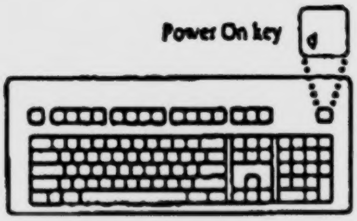
How you turn your Macintosh computer on depends on which model it is.

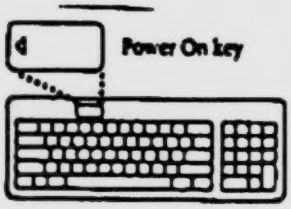
*Important: If an external hard disk or other external devices are connected to your Macintosh, turn on those external devices before you turn on the MAC.

If your Macintosh is the LC or if it doesn't have a separate monitor, press the on/off switch on the back of your computer.



If your computer is one of the Macintosh II models, press the power on key on your keyboard.





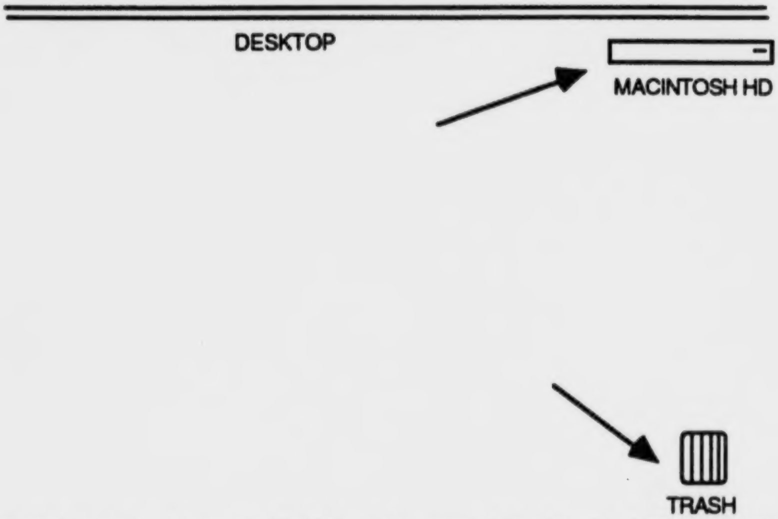
If the monitor doesn't turn on, make sure that its on/off switch is on. This switch is usually on the front of the monitor but if you can't find it, check the manual.

When you turn on your computer, the Macintosh looks for a startup disk that contains the information it needs to "start itself up." In your case the startup disk is a hard disk that's inside or connected to your computer. When the Macintosh finds a startup disk, it displays an icon and proceeds to start itself up.

Handout #S3 cont.
Using a Macintosh Computer

When your computer is done starting itself up, the screen displays the Macintosh "desktop." The desktop is a field of gray (or another color) with:

- a menu bar across the top.
- an icon near the upper right corner representing the startup disk.
- a trash icon near the lower right corner.



Simply double click on the startup disk(in this case Macintosh HD) and all available menus will open.

Summarizing an Accident Form

Many have experienced the confusion of traffic accidents and have had to summarize correctly what happened in a few words or less on insurance or accident forms. The following quotes were taken from those forms and published in the Toronto Sun, July 27, 1977.

*Coming home , I drove into the wrong house and collided with a tree I don't have.

*The other car collided with mine without giving warning of it's intentions.

*I thought my window was down, but I found out it was up when I put my hand through it.

*I collided with a stationary truck coming the other way.

*A truck backed through my windshield into my wife's face.

*A pedestrian hit me and went under my car.

*The guy was all over the road. I had to swerve a number of times before I hit him.

*I pulled away from the side of the road, glanced at my mother-in-law and headed over the embankment.

*In my attempt to kill a fly, I drove into a telephone pole.

*I had been shopping for plants all day and was on my way home. As I reached the intersection, a hedge sprang up obscuring my vision. I did not see the other car.

*I had been driving my car for 40 years when I fell asleep at the wheel and had an accident.

*I was on my way to the doctors with rear end trouble when my universal joint gave way causing me to have an accident.

*As I approached the intersection, a stop sign suddenly appeared in a place where no stop sign had ever appeared before. I was unable to stop in time to avoid the accident.

*To avoid hitting the bumper of the car in front, I struck a pedestrian.

*My car was legally parked as it backed into the other vehicle.

*An invisible car came out of nowhere, struck my vehicle, and vanished.

*I told the police I was not injured, but on removing my hat I found that I had a skull fracture.

*I was sure the old fellow would never make it to the other side of the roadway when I struck him.

*The pedestrian had no idea which way to go , so I ran him over.

*I saw the slow moving red-faced gentleman as he bounced off the hood of my car.

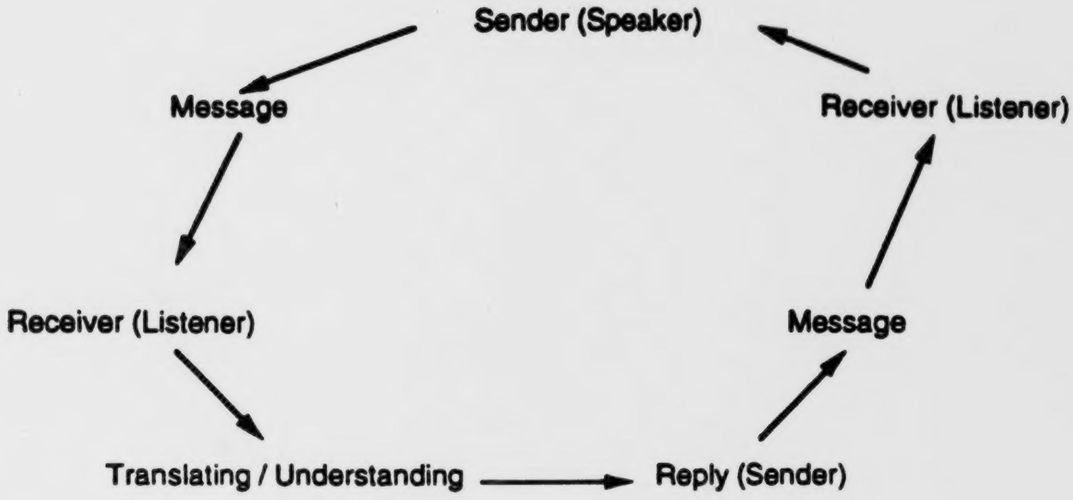
*The indirect cause of this accident was a little guy in a small car with a big mouth.

*I was thrown from my car as it left the road. I was later found in a ditch by some stray cows.

How would you like to face a judge with these reports?

Handout #5.1

The Communication Process


Sender (Speaker)
Message
Receiver (Listener)
Translating / Understanding
Reply (Sender)
Message
Receiver (Listener)

The Communication Exchange

Speaker's Role

- Select Topic
- Analyze Audience
- Plan Message
- Send Message
- Encourage Listener Response

Listener's Role

- Listen Actively
- Receive Message
- Translate Message
- Respond to Message

Letter to Welfare

These sentences were taken from letters written to Welfare asking for support.

I am forwarding my marriage certificate and six children. I had seven but one died which was baptized on a half sheet of paper.

I am writing the Welfare Department to say that my baby was born two years old. When do I get my money?

Mrs. Jones has not had any clothes for a year and has been visited regularly by the clergy.

I cannot get sick pay. I have six children. Can you tell me why?

This is my 8th child. What are you going to do about it?

Please find for certain if my husband is dead. The man I am now living with can't eat or do anything until he know.

I am very annoyed to find you have branded my son illiterate. This is a dirty lie. I was married a week before he was born.

In answer to your letter, I have given birth to a boy weighing 10 pounds. I hope this is satisfactory.

I am forwarding my marriage certificate and 3 children, one of which is a mistake as you can see.

My husband got hiss project cut off two weeks ago and I haven't had any relief since.

Unless I get my husband's money pretty soon, I will be forced to live an imortal life.

You have changed my little boy to a girl. will this make any difference?

I have no children as yet as my husband is a truck driver and works day and night.

In accordance with your instructions, I have given birth to twins in the enclosed envelope.

I want my money as soon as I can get it. I've been in bed with a doctor and he doesn't do me any good. If things don't improve I will have to send for another doctor.

18 Rules for Good Riting

Each pronoun agrees with their antecedent.

Just between you and i, case is important.

Verbs has to agree with their subjects.

Watch out for irregular verbs which has cropped into our language.

Don't use no double negatives.

A writer mustn't shift your point of view.

When dangling, don't use participles.

Join clauses good, like a conjunction should.

Don't use a run on sentence you got to punctuate it.

About sentence fragments.

In letters themes reports articles and stuff like that we use commas to keep a string of items apart.

Don't use commas, which aren't necessary.

It's important to use apostrophe's right.

Don't abbrev.

Check to see if you any words out.

In my opinion I think that an author when he is writing shouldn't get into the habit of making use of too many unnecessary words that he does not really need.

And, of course, there's that old one: Never use a preposition to end a sentence with.

Last but not least, lay off cliches.

APPENDIX

Unit 2 Instructor Narrative
The Personal Side

Psychologists conducting research in adult learning have identified a set of personal characteristics that, taken alone or together, influence a person's ability to learn. Not all personal characteristics affect a person's ability to learn. For example, friendliness is a wonderful personal characteristic that we all admire, but it has not been proven to have any effect on one's ability to learn. We all enjoy someone who has a good sense of humor, but a sense of humor does not affect learning either.

The four personal characteristics that influence learning and job performance to be discussed in this unit are (Use the acronym **GAPS** to remember them):

Goal-setting
Attributional style
Persistence
Self-efficacy

A dictionary definition is inadequate since there are several aspects to each characteristic. As you learn about GAPS, you may discover that you have different names for the personal characteristics. For instance, you might think of persistence as motivation. That's okay, the names don't matter. For purposes of this instruction however, please accept our names and definitions.

Our discussion will also show the relationships among these characteristics. You probably know that people who are self-confident are more likely to succeed. But did you know that success is not necessarily due to differences in ability? Self-confident people persist longer. Persistence leads to success, success increases self-confidence which, in turn, increases persistence. In this way self-confidence and persistence are related and the self confident person will learn more because of self-confidence and persistence and not because of ability.

The goal of this instruction is to increase awareness of these personal characteristics, how they influence each other, and how they influence learning and job performance. This knowledge can be used to improve your ability to learn and to improve your performance on the job.

GOAL SETTING

Set specific and challenging goals

Effective goal setting requires clear, specific, challenging goals. These will be easy to track and are measurable. An example of a clear specific goal is to increase typing speed by 10 words per minute. It is easy to judge when you have reached your goal.

You should not set "do best" goals, they are not clear and specific and they are not challenging. Challenging goals require serious effort to achieve, but they are attainable. They are not wildly beyond your current level of ability. Finally, set goals you are committed to. If you are not committed to them you will not make the effort needed for success.

Get feedback

Effective goal setting means getting feedback about your progress. Feedback is important whether positive or negative. Use feedback to determine if you have to increase your effort, choose another approach, or take some other action.

Set mastery goals

Mastery goals focus on improvement. You set a mastery goal by thinking about your current level of performance and choosing a goal that is an improvement over your current level. For example, if your current percentage of successful cold calls is 12%, a goal of 15% is an improvement. This goal is reasonable and challenging. Do not compare yourself to others when setting mastery goals. Mastery goals are set by you (often with input from supervisors) and should not be set without your input, you will not be committed to them.

Long term goals can be set according to a standard or another individual, and mastery goals will help you progress toward that standard. You should reward yourself for improvement.

When you set a mastery goal, you will try harder (persistence) to achieve your goal. You will feel less anxiety and frustration when feedback indicates that you have not achieved your goal. Mastery goals also serve as an antidote to the lowered self-confidence that occurs when you have failed to meet your goal. People who do not set mastery goals quickly abandon their goals when they experience failure.

ATTRIBUTIONAL STYLE

FOCUS ON IMPROVEMENT

People with a good attributional style notice improvement in their skills and abilities. You should not judge your success or failure by comparing yourself to others. Compare your performance to your previous performance and judge success by the amount of progress made.

Blame failure on approach and effort

You should not blame failure on ignorance or a lack of inborn ability. Lack of success should be blamed on the approach u sed or on a lack of effort. Avoid becoming easily frustrated or emotional about failure. Focus on analyzing the cause of failure. Persist in the face of failure. Use failure as a signal to increase effort or try a new approach.

Believe that ability is trainable

When you are learning something new, don't doubt your abilities. Do not stop trying because you think you lack the ability. You should believe that the effort you make in learning is more important than ability. Proper effort and an appropriate approach can improve your ability.

PERSISTENCE

Work hard

Learning requires a lot of time and effort. You must put in whatever time is required to achieve mastery of a subject. Sir Isaac Newton who "invented" calculus and discovered the principle of gravity was called a genius. He also worked hour after hour to learn new ideas. He experimented for days trying to understand them. He was known to work on a problem continuously, resting only to sleep, until he figured it out.

Continue to work in the face of failure.

Learning always involves failure. When you are learning some thing new, you will always make errors. Failure is a part of the learning process. You must not become discouraged by failure even though you are frustrated and have negative feelings. Don't waste time being upset, focus on the problem. Stay on task.

Thomas Edison's persistence led to his successful invention of the light bulb. He worked 2500 hours before he discovered that tungsten made the best filament. He continued to work in spite of failure. He discovered tungsten on the 500th try. That means there were 499 failures before he succeeded.

Try different approaches

Persistence is most effective when combined with a good strategy. An important part of persistence is trying different approaches. If one approach does not work you should try another. remember, Thomas Edison tried 500 different metals to get 1 that worked.

SELF-EFFICACY

Believe in your ability to learn and perform successfully

Self-efficacy or self-confidence is the belief you have about your ability to learn and perform successfully. People with good self-efficacy will usually try harder and persist longer when failure occurs. They also set more challenging goals and they set mastery goals.

Believe in your ability to control events

Good self-efficacy means you can control events around you. Do you believe you can cause success to happen? You should avoid blaming success or failure on luck or on others. Success or failure is determined by the amount of effort and the approach to learning or performance. You should believe tat with the proper amount of effort and the appropriate approach, you can control the events around you and make success happen.

Accentuate the positive

People with good self-efficacy focus on improvement and accentuate the positive. When you are getting feedback, you should focus on your successes and view your failures as opportunities for improvement. You should make positive statements to yourself often. Do not allow your self-efficacy (self-confidence) to depend upon favorable comments from others.

When you accentuate the positive, you will work harder, set higher goals, experience less anxiety and the negative emotions that accompany failure. Failure will not affect you for long nor will it affect other tasks or learning.

Exercise 2.1
Role-play #1

Player: **Lauren S.** is the customer service representative who works at Sports R Us, a sporting goods company and **Fred X.** is the customer on the telephone.

Role-play

Lauren S.: Thank you for calling Sports R us. My name is Lauren S. How may I help you today?

Fred X.: I bought a pair of roller blades from your store through the mail. When I looked at the bill you didn't give me the discount the advertisement had promised. I should have gotten a 10% discount.

Lauren S.: I am sorry there was a mistake in the billing. I'm sure we can correct it. Let me bring your purchase information up on my computer screen. What is the order number listed on your bill?

Lauren S.'s self-talk: I can easily meet this customer's needs. The procedures are simple and clear-cut. Seems like someone goofed. I can fix it.

Fred X.: I don't know my order number. I don't have the bill with me. How much will I get back from the 10% discount?

Lauren S.: I don't know, I'll need your bill to answer that question. I'll search for your name in the computer and see what comes up. No information under your name. Maybe it was entered under Zeres. Well Mr. Xeres, I have your order here. Did the roller blades cost $88.90?

Lauren S.'s self-talk: What do I do when the customer's order is not under his name or order number? Good thinking!

Fred X.: Yes, that's right. How much do I get back from the 10% discount?

Lauren S.: Well, you were not credited with the 10% discount. You'll get $8.89 back.

Lauren S.'s self-talk: Math is easy. Fixing customer problems makes them better customers. I enjoy helping people.

DISCUSSION OF SELF-TALK
Role Play #1

Lauren S.'s self-talk: I can easily meet this customer's needs. The procedures are simple and clear-cut. Seems like someone goofed. I can fix it.

Attributional Style-Blame failure on approach and effort. - Seems like somebody goofed. People who have a good attributional style blame failure on the approach to the problem and to a lack of effort. They are not likely to blame themselves and get discouraged by their own or others failures.

Self-efficacy - Believe in your ability to control events. - I can easily meet this customer's needs. I can fix it. You should believe that with the correct approach and the proper amount of effort you can control the events around you and make success happen. Events can be changed by you.

Lauren S's self-talk: What do I do when the customer's order is not under his name or order number? Good thinking!

Persistence - Try different approaches - "What do I do when the customer's order is not under his name or order number?" If one approach doesn't work try another.

Self-efficacy - Accentuate the Positive - "Good thinking." Make favorable comments to yourself.

Lauren S.'s self-talk: Arithmetic is easy. Fixing customer problems makes them better customers. I enjoy helping people.

Self-efficacy - Accentuate the Positive - "Arithmetic is easy. Fixing customers problems makes them better customers. I enjoy helping people." Make favorable comments to yourself. Focus on your successes.

Exercise 2.1
Role-play #2

Players: Andy D. is a credit card representative and Whitney H. is his supervisor. They are discussing Andy's performance.

Role-play

Whitney H.: Hello Andy, I'd like to discuss your job performance during these first four weeks.

Andy D.: I'll be happy to spend time with you. I've been looking forward to the chance to talk with you.

Andy's Self-Talk: this is a good chance for me to learn about areas in need of improvement. I hope Whitney can help me improve my skills in overcoming objections.

Whitney H.: Let me begin by saying that I am very pleased with the quality and quantity of your work.

Andy D.: Thanks, I'm glad to hear that. Can you be more specific about what I've done well and what needs improvement?

Andy's Self-Talk: I've worked hard and I know I've done a good job. And I can do better with some good feedback and additional practice.

Whitney H.: Well, one area in which you can improve is in overcoming objections. Instead of simply describing the credit policy to the customer, tell them how the policy benefits them. Then, more often than not, they will agree to follow it.

Andy D.: Are there certain customers that respond better to that approach than others? Are there other approaches with different customers?

Andy's Self-Talk: I'll practice one hour per day. Then, by my next feedback session, I'll have made a big step toward mastering my overcoming objections skills.

DISCUSSION OF SELF-TALK
Role Play #2

Andy's Self-Talk: This is a good chance for me to learn about areas in need of improvement. I hope Whitney can help me improve my skills in overcoming objections.

Goal setting - Get feedback "this is a god chance for me to learn about areas in need of improvement." Effective goal setting means getting feedback about your progress toward your goals. Feedback provides important information, whether the feedback is about success or failure. use feedback to decide if you have to increase your effort, choose another approach, or take some other action.

Attributional style - Focus on improvement "I hope Whitney can help me improve my skills in overcoming objections." Compare your performance to your previous performance and judge your success by the amount of progress you have made. You should be satisfied with making progress toward mastery of a skill or task.

Andy's Self-Talk: I've worked hard and I know I've done a good job. And I can do better with some good feedback and additional practice.

Self-efficacy - Accentuate the positive "I've worked hard and I know I've done a good job." Catch yourself being successful. Notice your successes and compliment yourself for them.

Attributional style - Blame failure on approach and effort "And I can do better with some good feedback and additional practice." Use failure as a signal for greater effort and to try a different approach. Persist in the face of failure.

Andy's Self-Talk: I'll practice one hour per day. Then, by my next feedback session, I'll have made a big step toward mastering my overcoming objections skills.

Goal setting - Set specific and challenging goals "I'll practice one hour per day." Effective goal setting means that you set clear, specific, and challenging goals. Clear and specific goals are easy to track and are measurable. It is easy to judge when you reach them.

Goal - setting - Set mastery goals "Then, by my next feedback session, I'll have made a big step toward mastering my overcoming objections skills." Mastery goals are goals that focus on improvement. You set a mastery goal by thinking about your current level of performance and choosing a goal that is an improvement over your current level of performance.

Exercise 2.1
Role-play #3

Players: Joe T. is the customer service representative who works at a mail order clothing company and **Mark F.** is the customer on the telephone.

Role-play

Joe T.: Thank you for calling Cross Casuals. My name is Joe T. May I help you?

Mark F.: I returned a pair of pants to you two months ago. I still haven't received the replacement. You sent me the wrong pants in the first place. You didn't hesitate to charge my credit card, though! And I am angry.

Joe T.: I don't blame you for being angry. You have not received very good service. May I have your customer id. number, please. It's on the back of the catalog you ordered from, right above your name.

Joe T.'s Self-Talk: I hate calls like these. Why do I get all the angry customers? You can't reason with any angry customer.

Mark F.: The package said pants, but there were shorts in it! The problem was with whoever packed the order. I want my money back!

Joe T.: I'll find out what the error was. But, I need your customer id. number so we can get this matter taken care of.

Joe T.'s Self-Talk: This guy is impossible. I don't have the patience to handle angry customers.

Mark F.: I have had problems with Cross Casuals in the past. Last year there was an item on my bill that I never ordered.

Joe T.: I'll help you as soon as you give me your customer id.

Joe T.'s Self-Talk: This is going to ruin my whole day. These calls make it hard for me to do a good job.

DISCUSSION OF SELF-TALK
Role-play #3

Joe T.'s Self-Talk: I hate calls like these. Why do I get all the angry customers? You can't reason with an angry customer.

Self-efficacy - Accentuate the positive - Instead of self-talking that "I hate these calls," and "Why do I get all the angry customers?" say, "I've been known to deal with angry customers, let me think of the steps I must take."

Joe T.'s Self-Talk: This guy is impossible. I don't have the patience to handle angry customers.

Attributional style - Blame failure on effort and approach - Instead of saying, "this guy is impossible. I don't have the patience to handle angry customers, "say "What other steps do I know for handling angry customers. I know different approaches, I'll keep trying different ones until I win him over."

Joe T.'s Self-Talk: This is going to ruin my whole day. These calls make it hard for me to do a good job.

Self - efficacy - Accentuate the positive - Instead of saying, "this is going to ruin my whole day. These calls make it hard for me to do a good job, "say, "This call will give me some good practice in handling difficult customers."

Exercise 2.1
Role-play #4

Players: Charles H. is an insurance claims handler and **Sandy** is his supervisor. They are discussing Charles' performance.

Role-play

Sandy: A problem has come to my attention and I would like to talk to you about it. Three times in the last four weeks your weekly Activity Report has been late and they contain errors.

Charles H.: Yes, I'm afraid they have been late.

Charles H.'s Self-Talk: I can't do anything right. It's not my fault.

Sandy: These activity reports are critical. They help management stay on top of our workforce needs. we need accurate and timely information to hire temporary workers or give part time workers more hours when we have very heavy workloads.

Charles H.: I see.

Charles H.'s Self-Talk: I get too much work. It's not my fault. These reports aren't really important, anyway.

Sandy: What seems to be the problem with getting the Activity Reports done?

Charles H.: Well, I always start on them on Friday afternoon. I try to get all of my jobs for the week handled before I start on the reports. And, I guess a few times I've run out of time. But, shouldn't I do the claims first? That's what I always thought.

Charles H.'s Self-Talk: I get too much work. It's not my fault. These reports aren't really important, anyway.

Sandy: I don't believe they are that important. You expect too much of the claims handlers.

DISCUSSION OF SELF-TALK
Role-play #4

Charles H.'s Self-Talk: I can't do anything right. It's not my fault.

Persistence - Continue in the face of failure: Instead of saying, "I can't do anything right", say, "I need to improve, if I keep trying, eventually, I will succeed."

Attributional Style - Blame failure on effort and approach: Instead of saying, "It's not my fault", say "If Sandy can tell me about the methods the others claims handlers use, I'll spend some extra time learning them. Then I'll succeed."

Charles H.'s Self-Talk: I don't believe they are that important. You expect too much of the claims handlers.

Goal - setting - Set specific and challenging goals: Instead of denying what Sandy has said and stating, "I don't believe they are that important", say "Let me work with John D. for two weeks. I'll learn his method and starting the third week I'll do the Activity Reports on my own. He always gets his reports in on time."

Goal - setting - Focus on improvement: Instead of saying, "You expect too much of the claims handlers", say "I can work on correcting my errors first, then I'll work on completing the reports on time."

Charles H.'s Self-Talk: I get too much work. These reports aren't really important, anyway. I hate being criticized.

Goal - setting - Get feedback - Instead of being defensive and saying "I get too much work. these reports aren't really important, anyway", say, "Sandy is giving me useful information to help me improve. Together we can work out a plan for my improvement."

Self - efficacy - Accentuate the positive: Instead of saying "I hate being criticized", "This feedback will help me be a better claims handler. Now I have an to make my work easier to complete accurately and on time."

Exercise 2.1
Role-play #5

Player: Sanjay is a trainer in a computer company. **Ellen** is a student who is practicing handling customer calls. The role-play has just been completed. Ellen has just heard the audio tape of her role-play. Sanjay is giving Ellen feedback on her performance.

Role-play

Ellen: Well, how did I do?

Sanjay: You did a fine job, but there are some areas for improvement. Let's discuss them.

Ellen's Self-talk: I was horrible. Do I really sound like that!

Sanjay: You demonstrated very good social sensitivity. But you were a little unsure about what were the proper steps to complete the call.

Ellen: There are a lot of steps to remember.

Ellen's Self-Talk: I'll never be able to remember all those steps.

Sanjay: You forgot some of the information the customer gave you at the beginning of the call.

Ellen: Yes, I was concentrating on what I'm supposed to say and forgot what the customer wanted to change in his order.

Ellen's Self-Talk: Everyone else in the class can handle these calls, why can't I?

Sanjay: You explain yourself very well.. But you should repeat back to the customer what you think he said about changing his order. This will ensure you understood what he wanted to change in his order.

Ellen: What did I say after he told me what he wanted changed in his order?

Ellen's Self-Talk: I wonder if I have the ability to be a customer representative, I made so many mistakes in the role-play.

DISCUSSION OF SELF-TALK
Role-play #5

Ellen's Self-Talk: I was horrible. There are so many things to remember!

Self-efficacy - Accentuate the positive: Instead of saying, "I was horrible", say, "I did a good job for a beginner. I can master this stuff!"

Self - efficacy - Believe in your ability to control Instead of saying, "there are so many things to remember!", say, "I need to get more feedback so I can find out areas I need to improve. Then I'll work hard on those areas and then I'll be successful."

Ellen's Self-Talk: I'll never be able to remember all those steps.

Goal-setting - Set specific and challenging goals: Instead of saying, I'll never be able to remember all those steps", say, "I'll first memorize the steps for closing the call. Then, I'll ask for some extra role-plays tomorrow to practice the close."

Attributional style - Focus on improvement: Instead of saying, "I'll never be able to remember all those steps", say, "I did a better job with these role-plays than I did with the first role-plays I did."

Ellen's Self-Talk: Everyone else in the class can handle these calls, why can't I?

Goal-setting - Set mastery goals: Instead of saying, "Everyone else in the class can handle these calls, why can't I?, say, "Sanjay's information is important to help me know how to improve."

Goal-setting - Get feedback: Instead of saying, "Everyone else in the class can handle these calls, why can't I?, say, "Sanjay's information is important to help me know how to improve."

Ellen's Self-Talk: I wonder if I have the ability to be a customer representative. I can't wait until class is over.

Attributional style - Believe ability is trainable: Instead of saying, "I wonder if I have the ability to be a customer representative", say, "With the right amount of practice and good feedback about what I need to improve, I'll do a great job as a customer representative."

Persistence - Work hard: Instead of saying, "I can't wait until class is over", say "I wonder when I can get the chance to do some extra role-plays. The extra practice will improve my skills."

Exercise 2.2
Scenario #1 - Goal-setting

Joe is a telemarketing representative. He is responsible for calling potential customers to sell a credit card called SuperCard. He makes cold calls to customers and accepts calls from customers who are calling in response to newspaper or television ads. Joe has achieved 80% of his sales quota each of his first five months on the job. Sales quota results are reported monthly. His supervisor has given him feedback that he must spend more time selling the benefits of the credit card when speaking to the customer.

Scenario #2 - Attributional Style

Ron is a Sales Representative for a home furnishings manufacturer. He has asked his supervisor, Allison, for some feedback about his job performance. Ron has been working at this job for six months. His supervisor has sat with him and listened to his handling of eight customer calls. She is now prepared to give him feedback about the results.

Allison tells Ron that he did quite well talking to the customers. He was able to make the customers feel at ease when he spoke to them. He spoke clearly and in a friendly way. He presented the products in a way the customer was able to understand. When the customer made a comment he listened well and answered the customer's questions. On each call he asked for the sale.

Allison said that Ron had some areas for improvement. Ron should practice presenting the products in a way that is not a simple description, but includes how the customer can use them for his or her benefit. Allison also noticed that Ron has some trouble calculating some of the discount rates.

Scenario #3 - Persistence

Lauren is a new Account Representative for Centurion Appliances. Centurion is a large appliance chain that sells household appliances and home furniture.

Lauren is in her first week of training. She has never worked as an account representative before. She is learning how to operate the computer system she will work on, the computerized billing system, and all the accounting procedures needed to handle sales and post-sales activities.

Lauren is feeling a little overwhelmed. She must learn how to handle the computer, remember all the procedures, and talk to customers. There is a lot to learn and Lauren has not gotten everything right the first or even the second time. The most difficult skills for her is the computer commands. Her best areas are controlling the call with customers and communicating effectively. Lauren is discouraged about her ability to become a successful account representative.

Scenario #4 - Self-Efficiency

Marlene is a customer representative for an insurance company. She is doing the paper work associated with the customer calls she has handled during the past two hours. There is a lot of paperwork because there were a lot of calls. She has 30 minutes to complete the paperwork and then she must return to the telephone and handle more customer calls. Marlene's supervisor comes by and asks Marlene to handle the paper of a co-worker who has gone home ill. Marlene asks if she can have additional time to do the paper work. Her supervisor says she'd like to give Marlene extra time but cannot because she now has two fewer customer representatives because of illness.

Exercise 2.2 Discussion
Scenario #1 - Goal-setting

Set specific and challenging goals

Joe should set a clear and specific goal, not "I'll do my best" goals. For example, Joe should set a goal of increasing his sales quota percentage to 90%. He doesn't have to aim for 100% immediately.

Joe could establish another goal to make at least four "benefits" statements for each customer contact. Joe might even write down benefit statements he can make. He can refer to the list while on the call with the customer.

Get feedback

Joe should get feedback from his supervisor about his sales quota performance and his progress in making benefits statements. He should get weekly sales quota feedback so that he knows before the month is over if he is improving. He should arrange for his supervisor to listen in on his customer calls so he can find out if he is making more "benefits" statements. Joe can also get feedback about his benefits statements by role-playing with his supervisor or another customer representative.

Set mastery goals

Joe's sales quota goal should be an improvement for Joe. If the department's average sales quota performance is 150%, he should set a challenging goal which is an improvement for himself. He should not worry about how the others are doing. He should not set 150% as the goal unit it is reasonably within his grasp.

Joe's "benefits statement" goal is unique to Joe. The feedback he received is tailored to his needs. Improving his benefits statements helps Joe master his job. This goal is not focused on making him better than others but better than he was before. Joe should reward himself for improvement.

Scenario #2 - Attributional Style

Focus on Improvement

Ron should compare his performance feedback to the previous performance feedback. He should notice any improvement. He should not compare his performance to other Sales Representatives. Ron's focus must be on mastering the skills he will use as a Sales Representative.

Blame failure on approach and effort

Allison indicated to Ron that there were some things he could do better. Ron should not respond negatively to this feedback. He should be glad for it and use it to improve. He should not blame himself, but blame the approach he uses when calculating the discounts. He should blame his calculation problems on a lack of effort to learn how to do the calculations. He should react to the other areas in need of improvement in the same way. He should ask Allison for as much feedback as possible.

Believe ability is trainable

Ron should create a training plan that improves his method of telling the customers about the products. he should also create a plan to improve his arithmetic skills. He should not doubt his ability to learn these skills. He should not wonder whether or not he has the in-born ability to learn these skills.

Scenario #3 - Persistence

Focus on improvement

Lauren should focus on getting accurate feedback about her improvement. Lauren needs to know what areas of her performance need improvement. Accurate feedback will help her track her improvement. Then she can focus on improving those areas. Lauren should focus on improving her skills with the computer. She should set reasonable and challenging goals for improvement.

Blame failure on effort and approach

Lauren should remember that failure is part of learning. Developing new skills takes time and during that time a lot of failure will occur. Lauren should guard against becoming too frustrated and emotional. If she becomes too frustrated and emotional she will be distracted from making a greater effort or considering a different approach. Lauren must not become defensive about criticism, she will stop listening to feedback and start blaming herself or others.

Lauren must remember that failure is a cue to try harder. She should try to arrange extra practice on the computer. Failure is a cue to try different approaches. Lauren should try a different approach with the computer, maybe she should go back to earlier lessons where she was successful and start again from there.

Believe ability is trainable

Lauren has allowed the failures she has experienced to discouraged her. She thinks she cannot learn and improve because she lacks the ability. Instead of blaming failure on effort or approach she has blamed it on her ability. Lauren should remember that ability is trainable. She should remember that few abilities are fixed at birth. Lauren should not doubt her abilities; this leads to discouragement and quitting. She should remember that the effort you make is more important than ability. With the right amount of effort and a positive approach she can improve her account representative abilities.

Scenario #4 - Self-Efficiency

Believe in your ability to control events

There are several events that cannot be controlled by Marlene - the high number of customer calls, the extra work her supervisor gave her and the shortage of workers on this day. Marlene should realize that there are many aspects of the situation which she can control. For example, Marlene can ask her supervisor if she can complete some of the paperwork the next day. Marlene can identify those pieces of paperwork that can wait. She can identify the simple paperwork which she can do while she is on the telephone speaking to customers.

Marlene should avoid comments about her bad luck - "Why do I get all the hard work?" or "I'll never be able to get all this work done. She should be confident that she can find a strategy which will enable her to get the work done and that with the right amount of effort she will succeed.

Accentuate the positive

Marlene may feel that her supervisor gave her extra work which she didn't need. She should accentuate the positive by recognizing that her supervisor gave her the extra work because she was confident in her skills and in her ability to get it done. Marlene should praise herself for the good work she has done. She should praise herself again because her supervisor as confident in her ability to handle an extra assignment on a busy day. She should also compliment herself because of the many good ideas she has come up with to get the work done.

Marlene's positive statements will help eliminate anxiety and bad feelings she might feel about her work load. It will help her to motivate to get the work done.

Exercise 3.1

Directions

Identify any comprehension problems in the following examples and determine which strategies to employ to effectively deal with the problem.

Example 1

Joyce is an outbound telemarketer for a major credit card company. She had an application for Mr. Johnson that was denied because he was an expatriate.

Do you know what an expatriate is? Read on.

He replied "yes" to American citizen on his application but he had been living out of the country for the past 3 years.

Example 2

The outside temperature in Lake Havasu was 105 degrees Fahrenheit yesterday. All the windows were open in the house yet it was only 84 degrees inside the house.

Example 3

Mary Smith and Joan Jones were talking in the supervisors office yesterday. She had been irresponsible in handling customers on several occasions, so she fired her.

Example 4

The phones at City Hall were not working for 3 hours today. The repair team was there within fifteen minutes. The phone company gives their employees very good benefits. The phones were out because the cable company had cut through the lines.

Example 5

There was nobody on the elevator. It was so crowded there was no room for me to stand anywhere.

Example 6

Follow these steps to setup your ACME computer:
1. Remove the computer, monitor and printer from their boxes.
2. There are two cables on your monitor. Connect the first to your computer.
3. Connect the printer cable to the computer and to the printer.
4. Turn on your computer.

Exercise 3.1 Answer Key

Directions

Identify any comprehension problems in the following examples using the evaluation questions in the student guide strategies to employ to effectively deal with the problem.

Example 1

Joyce is an outbound telemarketer for a major credit card company. She had an application for Mr. Johnson that was denied because he was an expatriate.

Do you know what an expatriate is? Read on.

He replied "yes" to American citizen on his application but he had been living out of the country for the past 3 years.

The word expatriate should be new and by reading on they will become aware of the meaning, someone who lives outside his own country.

Example 2

The outside temperature in Lake Havasu was 105 degrees Fahrenheit yesterday. All the windows were open in the house yet it was only 84 degrees inside the house.

Many of us would be confused by this. How can the temperature vary by so much? Actually a cooling system that works by humidification (adding water to the air) will do this. If we don't have the necessary background knowledge this will seem confusing.

Example 3

Mary Smith and Joan Jones were talking in the supervisors [also correct on student version] office yesterday. She had been irresponsible in handling customers on several occasions, so she fired her.

Who got fired? Is Mary or Joan the supervisor? This excerpt is ambiguous.

Example 4

The phones at City Hall were not working for 3 hours today. The repair team was there within fifteen minutes. The phone company gives their employees very good benefits. The phones were out because the cable company had cut through the lines.

Does the third sentence have anything to do with the phone problem?

Example 5

There was nobody on the elevator. It was so crowded there was no room for me to stand anywhere.

This seems to be inconsistent; how can it be crowded if there isn't anyone on the elevator? Suppose there was a load of furniture in the elevator.

Exercise 3.1 Answer Key

Example 6

Follow these steps to setup your ACME computer:
1. Remove the computer, monitor and printer from their boxes.
2. There are two cables on your monitor. Connect the first to your computer.
3. Connect the printer cable to the computer and to the printer.
4. Turn on your computer.

Steps are left out and some instructions are not clear.

Exercise 3.2
Dealing with Unfamiliar Vocabulary

Directions

The examples below are based on materials and situations customer service representatives may come across in their jobs. Suppose you are a customer service representative reading the materials or experiencing the situations. Assume that each example contains at least one word that is not familiar to you. (These words are underlined in the examples.) Your task is to decide what to do about the unfamiliar words. Write down whether the unknown word is important for understanding the main idea of the message. If it is, write down what strategy makes the most sense for dealing with it.

Example 1

Mr. Duncan called your company after business hours and left a message on voice mail asking a representative to call him back in the morning. It is your job to return the call. Your co-worker, who knows Mr. Duncan, says he is irascible.

Example 2

Mr. Duncan called your company after business hours and left a message on voice mail asking a representative to call him back in the morning. It is your responsibility to return the call. Your co-worker, who knows Mr. Duncan, says he is corpulent. She goes on to say that he is so corpulent he can't buy his clothes at a regular store because they don't carry sizes large enough to fit him.

Example 3

You are an employee at Jefferson Savings Bank who has frequent customer contact. You hear the bank has just begun to offer a home equity line of credit. By using the equity in their home, customers may qualify for a sizeable amount of credit, available for use when and how the customer pleases, at an interest rate that is relatively low.

Example 4

You receive the following memo from your supervisor about a fundraising effort your company is sponsoring:

We are participating in a program organized by Pizza Village to raise money for victims of Hurricane Ronald who have lost their homes. For every pizza purchased by our employees, Pizza Village will donate 50% of the cost to the hurricane victims. The pizzas will be on sale in the cafeteria every day next week from 12 until 2:00. The savory pizzas cost only $2.50 a piece. We hope you will help out in this worthwhile effort.

Exercise 3.3

Directions

The following excerpts contain problems you might encounter while reading brochures and pamphlets. You should be able to identify the problems by asking the six questions for evaluating understanding.

Excerpt 1 (Source: a consumer information brochure describing a product)

This new hairdryer is an innovation in personal care, specifically engineered for safety. It is for household use and plugs in to an AC electrical outlet. This unit has an ALCI safety device equipped with a test button to check its operation. It also has a polarized plug as a safety feature.

Excerpt 2 (Source: a brochure describing financial investment opportunities)

The investment objective of the Social Criteria Fund is to provide investment returns that reflect the broad investment performance of the financial markets while giving special consideration to companies conducting the business in accordance with specified social concerns. Thus, the funds invest in companies that are friendly to the environment, manufacture weapons, and produce tobacco products.

Excerpt 3 (Source: instructions for making a withdrawal from an ATM, automated teller machine)

To withdraw cash from the ATM:
1. Insert your card into the slot, with the stripe at the lower left.
2. Enter your PIN when prompted by the message on the screen.
3. Select the option "withdraw cash from checking" by pressing the key next to that item on the menu.
4. Remove the cash from the dispenser, your receipt and your card.

Excerpt 4 (Source: a brochure describing an airline's frequent flyer program)

The member in the frequent flyer club must travel on scheduled service flights to earn mileage credit. Charter flights are not applicable. The purchase of a ticket does not entitle an individual to mileage credit unless flights are actually flown by the member. Mileage will not be awarded for tickets purchased to carry excess baggage. Mileage will be awarded if you purchase a non refundable ticket but do not use it.

Excerpt 5 (Source: a brochure describing the special coverage offered by a premium credit card)

If you become sick while traveling, our medical protection program will help by providing referrals to local doctors, hospitals and pharmacies. It will also help by assigning a doctor or nurse to monitor your care through consultation with local doctors or hospital staff in a medical emergency. It will provide assistance in finding a legal advisor or consulting with appropriate embassies or consulates. These services are available to you 24 hours a day, seven days a week.

Exercise 3.3 cont.

Excerpt 6 (Source: a business brochure describing customer billing rights)

If you think your bill is wrong, write us on a separate sheet of paper. In your letter, give us your name and account number, the dollar amount of the suspected error, and a description of the error. It is particularly important to include it; if you do not, we will be unable to process your claim.

Exercise 3.3 Answer Key

These are the intended errors for the exercise; however; students may indicate other concerns when reading these excerpts.

Excerpt 1 (Source: a consumer information brochure describing a product)

Are there words I don't understand? **#1**

polarized- one blade of the electrical plug is larger than the other so it will only fit into certain polarized outlets.

ALCI- acronym for appliance leakage current interrupter.

Is there any information missing or not clearly explained? **#6**

There may not be enough information to fully understand the information about the safety features.

Excerpt 2 (Source: a brochure describing financial investment opportunities)

Are there any ideas that don't fit with what I already know? **#3**

Weapons manufacturing and producing tobacco products are not "friendly to the environment. Therefore, the last sentence should be rewritten to indicate that the fund does not invest in these commercial enterprises.

Excerpt 3 (Source: instructions for making a withdrawal from an ATM, automated teller machine)

Are there any words that I don't understand? **#1**

PIN may need to be clarified.

ATM is defined but may need further clarification.

Is there any information missing or not clearly explained? **#6**

There is no instruction for entering the amount of cash to be withdrawn. This should occur between steps 3 and 4.

Excerpt 4 (Source: a brochure describing an airline's frequent flyer program)

Are there any ideas that don't fit together because I think they are contradictory? **#5**

The second sentence indicates the member must fly while sentence 4 indicates that the member need not fly if the ticket is non refundable.

Excerpt 5 (Source: a brochure describing the special coverage offered by a premium credit card)

Are there any ideas that don't fit together because I can't tell how they are related? **#4**

The first 2 sentences address medical coverage and the third explains legal assistance. This sentence doesn't belong in this paragraph.

Exercise 3.3 Answer Key cont.

Excerpt 6 (Source: a business brochure describing customer billing rights)

Are there any ideas that don't fit together because I can't tell who or what is being talked about? #3

> The word "It" in the final sentence is ambiguous. Which item is particularly important?

Unit 4 Examples

Acronyms

The Great Lakes

H URON
O NTARIO
M ICHIGAN
E RIE
S UPERIOR

Civic Organizations

P olice
A thletic
L eague

M others
A gainst
D runk
D riving

Other

S elf
C ontained
U nderwater
B reathing
A pparatus

Acrostics

To remember the planets in our solar system, think; **M**y **V**ery **E**arnest **M**other **J**ust **S**howed **U**s **N**ine **P**lanets.

M ercury **V** enus **E** arth **M** ars **J** upiter **S** aturn **U** ranus **N** eptune **P** luto

Exercise 4.1
Learning Computers The Easy Way

Function Key 1 (F1) is the **HELP** key. We can remember it in this way:

Picture yourself on a deserted island with nothing in sight but water. There is, however, a huge **pen**, about 30 feet long, on this island. You can stand this pen up in the sand with a red flag on top to attract attention. The flag has **HELP** written on it in white letters. This pen looks like a big number 1 and you'll always remember that **F1**, the pen, is the **HELP** key.

Function Key 2 (F2) is the **EDIT** key. Listen to this story:

Now you are lying on the grassy bank of a beautiful blue lake. The water is like glass. In the distance you see a magnificent white **swan,** and the swan looks like a big number 2. The swan is moving past you on the lake and you notice that the swan, a big number 2, is wearing a bright green editor's visor. When you look at **F2**, think 2 looks like a swan with an editor's visor and you'll remember that F2 is **EDIT**.

Function Key 3 (F3) is the **NAME** key. An easy way to remember this is:

The number 3 when it lies on its side open end up looks like a person's **buns**. All we have to do now is print **NAME** across these buns. Now when you see the number 3, it will lie on its back and you'll remember **NAME**, the function of **F3**.

Function Key 4 (F4) is the **ABS** key. To remember this function:

We have to think of what a 4 looks like. I picture a sail on boat. Can you picture a big **sail** all opened? This sail can be your favorite color. Printed on this sale are the letters **A, B, S**. It might be an advertisement of some kind but all you can see is **ABS** on a sail that looks like a number 4. So , we can easily remember that **F4** is the **ABS** key.

Function Key 5 (F5) is the **GO TO** key. What does the number 5 look like?

Doesn't it look like a big **hook**? Let's picture a performer on a stage who is doing just terrible and the stage manager wants him off the stage. He wants him to **GO TO** the dressing room. So this big **hook** shaped like a number 5 swings down and hooks the performer by his belt and makes him **GO TO** the dressing room. Can you remember now that a five looks like a hook and means **GO TO**? So **function key 5**, or **F5** means **GO TO.**

Function Key 6 (F6) is the **Window** key. Now a 6 looks like a golf club, so:

Imagine yourself with this **golf club** in hand getting to swing off the 6th tee, and somehow your shot goes wide right through the picture window in the clubhouse. An event like this would certainly remind you that function key 6, **F6** is the **WINDOW** function.

Function Key 7 (F7) is the **QUERY** key. Let's start with the 7:

It looks like a cliff and, if you will, imagine a sharp **cliff**. You're standing on the edge of the **cliff** and looking down you see a Quarry. This quarry, which sounds like **QUERY**, is full of question marks. With this in mind , think 7 is a cliff overlooking a quarry full of question marks, which means **F7** is **QUERY**.

Function key 8 (F8) is the **TABLE** key. What doe the number 8 look like?

It looks like an **hourglass**. You walk into a restaurant and the base of every table is an hourglass. All of the table cloths have hourglass designs on them. It is so easy now to remember that 8 is an hourglass holding up a **TABLE,** so **F8** is **TABLE**.

Function Key 9 (F9) is the **CALC** key. Let's turn nine sideways and it looks like a **pipe**.

If the number 9 looks like a pipe, let's have a professor hold that pipe up to his mouth. Now, with his other hand, the professor is doing some figuring on a calculator. O.K. we have a 9 that looks like a pipe being held by a professor using a **calc**ulator. **F9** is the **CALC** function.

Function Key 10 (F10) is the **GRAPH** key. This is the last function key.

The number 10 looks like a **bat and a ball**. The appropriate place to use a bat and ball is on a baseball field. If we look at a baseball field from above, it has lines up and down and across. It might look just like a graph. So when we see the number 10 we will think of a ball and bat. That will remind us that looking at a baseball field is like looking at a graph and F10 is the **GRAPH** key.

Those are all 10 function keys for Lotus 1-2-3. Now try to complete your activity sheet.

Exercise 4.1
Learning Computers The Easy Way

The Lotus 1-2-3 Function keys
What are the appropriate Function Keys (F1-F10) for the Lotus 1-2-3 functions below?

	Before	After
CALC	_____	_____
ABS	_____	_____
NAME	_____	_____
GO TO	_____	_____
TABLE	_____	_____
EDIT	_____	_____
WINDOW	_____	_____
GRAPH	_____	_____
HELP	_____	_____
QUERY	_____	_____

The Mnemonic Device

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Exercise 4.2
Summarization Rule # 4: Condense paragraphs

Directions:

Using all the rules for summarization, write a summary of the following passage. Remember to see if ideas from different paragraphs are related.

The Moonbeam Corporation manufactures office furniture and supplies for the environmentally conscious office environment. The available items range from office furniture, such as desks and file cabinets, to office supplies, such as paper and rubber bands.

All of the Moonbeam Corporation's products are made of 100% recycled materials. The production plant, located in Chicago, Illinois, has a recycling division which collects recyclable materials from the surrounding area. The plant recently received the "Community Ace" award from the local government for its part in maintaining a healthy environment.

All desks, chairs, bookcases, and file cabinets are available in several designs and come in Astral Blue, Lava Red, Grassy Green, or Sunbeam Yellow. All equipment is painted with non-toxic, environmentally safe paints and has a high gloss finish. We also offer accessories such as pencil holders, staplers, and trash cans in matching colors.

The Moonbeam Corporation also produces a wide variety of 100% recycled paper products, ranging from small memo pads to computer and copy paper. All of these products are available in Astral Blue, Lava Red, Grassy Green, or Sunbeam Yellow to coordinate with the rest of the office environment.

In addition to manufacturing office furniture and supplies, we offer a special service to all Moonbeam customers. We will send one of our office coordinators to visit the customer's office site. This coordinator will suggest the best design and layout of office furniture given the available environment. The coordinator will also interview any available employees to plan the most pleasing color scheme for those who will actually be working in the environment. This is a unique service that we supply in order to provide the best office environment possible.

Check
Did you follow the 4 self-management steps?

Exercise 4.3 Teacher Instructions And Answer Key
Locating Information In A Table

After distributing Table 4.3 and Worksheet 4.3, do the following sample question:

Sample Which models have car ports?

The first step is **goal formation**. What do we need to know? **Response**: How many of these models have car ports and what are their names?

The second step is **category selection**. Which row or column headings should we look at? **Response**: The column labeled "External Options" lists all instances of car ports.

The third and final step is **selective inspection**. How do we find the specific information to answer the question? **Response**: Follow the rows out to the model names which answer the question.

Which models have car ports? The **Connecticut** and **Pennsylvania** models.

1. Does any model have a 2-car garage? If so, which one(s)?
   Yes, Maryland and Carolina
2. Does any model have a basement? If so, which one(s)?
   Yes, Connecticut and Carolina
3. Does any model have a basement and 2 master bedrooms? If so, which one(s)?
   Yes, Connecticut
4. Does the "Pennsylvania" model have the option of a cooking island?
   No
5. Which models have the option of an inground pool?
   Carolina
6. Does any model have more than 2 bathrooms? If so, which one(s)?
   Yes, Maryland, Connecticut and Carolina
7. How many bedrooms in the "Connecticut" model have attached bathrooms?
   Two, see notes, all master bedrooms have attached bathrooms
8. Does any model have the option of a breakfast nook? If so, which one(s)?
   Yes, Virginia and pennsylvania
9. Which model has the most living areas?
   Carolina
10. Are there more models with attached patios or separate patios?
    Attached, Maryland, Carolina and Pennsylvania are attached while Connecticut and Florida are separate
11. Does any model have wooden fences? If so, which one(s)?
    No, see notes, all fences are stainless steel
12. Is any model available with a fireplace, a cooking island, and two levels? If so, which one(s). **Yes, Maryland and Florida**

Exercise 4.4 Worksheet
Locating Information In A Table Of Contents

Directions
Using the information in Table 4.4, Locating Information In A Table Of Contents, indicate on which page can you find the information being requested.

1. How do I file a claim?
2. Who can write payroll checks?
3. What is the petty cash policy?
4. How much do I pay in to Social Security?
5. Does my insurance cover Emergency Room care?
6. When are bank deposits made?
7. How many kinds of insurance plans are there?
8. How much will my take-home pay be?
9. What information is in the customer ledger?
10. Can insurance premiums be deducted from payroll?

Exercise 4.4 Teacher Instructions and Answer Key
Locating Information In A Table Of Contents

This exercise can be an individual or group activity. If used for a group, the instructor should read each question and ask the students to raise their hands when they believe they have the correct answer.

First, let's do a sample question together. "Where do I make payments?"

Step 1, Choose the correct heading, "Handling Cash, Checks, and Payroll"
Step 2, Scan the subheadings; choose a subheading, "Banking Activities"
Step 3, Select the next correct subheading, "Making Payments"

The correct answer is **page 60.**

1. How do I file a claim?	**57**
2. Who can write payroll checks?	**67**
3. What is the petty cash policy?	**63**
4. How much do I pay in to Social Security?	**66**
5. Does my insurance cover Emergency Room care?	**55**
6. When are bank deposits made?	**61**
7. How many kinds of insurance plans are there?	**56**
8. How much will my take-home pay be?	**65**
9. What information is in the customer ledger?	**53**
10. Can insurance premiums be deducted from payroll?	**66**

Exercise 5.1
Communication Scenarios

Scenario 1

Joe Rosko works in the billing office of a major department store. A customer calls and immediately begins describing a problem he has had with his credit account at the store. It is a complicated situation; he is very upset, and he talks quickly. Joe doesn't interrupt the customer until he finishes his story, which takes about three minutes. Joe responds by saying, "O.K., please give me your name and account number and tell me what the problem is." The customer yells, "I just told you all of that!" and slams down the phone.

Scenario 2

Jessica Gibbs works for a company that sells computer software. A customer calls and asks her to describe the features of the software package that tracks diagnostic procedures. Jessica doesn't understand the question because she doesn't know what "tracks diagnostic procedures" means.

Scenario 3

Maria Loeb, a customer service representative at an insurance company, received a call from a very irate policyholder. The policy holder had received a cancellation (lapse) notice in the mail for his July premium payment. The policyholder was upset because the payment f or his July premium had been mailed three weeks before receiving the lapse notice. Maria requested the policy number so she could review the payment history on her computer. Upon checking the policy description, Maria noticed that it did not fall into her assignment area. After spending ten minutes talking long distance, Maria informed the customer that she could not help and would have to transfer the call. Maria transferred the call to the appropriate representative and said, " I have a call for your area." She then connected the customer and hung up.

Scenario 4

Mohammed Jones is a home electronics salesman. A customer walks into the store and asks, " What are the advantages of this cordless phone?" Mohammed replies, " it has 10 channels, 30 number memory, and Super CCT circuitry that operates in the 27 to 49 megahertz range." The customer nods politely and says, " That's quite a phone. I'm going to look around a little bit, thank you."

Exercise 6.1
Rewriting a Memo

Instructions: Rewrite this memo applying standard rules of grammar, spelling, and punctuation.

Sandy: Are you and me going to attend the XYZ convention together again this year? The travel agent that makes our company's arrangementsis anxiousto finalize our plans Its good to make arrangements well in advance.

I think we should all get together some time soon to coordinate our plans. One of th engineers from production are going three are goin from Chris' area. None of Fran's team are going, however though I wish it was possible.

I've asked Mo to take my notes from the last meeting when she comes to our planning session. Between you and I Sandy, Mo should be attendin the convention to.

XYZ shiuld profgit by our attendants. We made a lot of voluable contacts last year---contacts that effected our profit marsghin.

Let's discuss this.

P.J.

Exercise 6.1
Rewriting a Memo, Correction Sheet

Instructions: Rewrite this memo applying standard rules of grammar an punctuation.

Sandy:

I
Are you and me going to attend the XYZ convention together again this year? The travel
who **It's**
agent that makes our company's arrangements is anxious to finalize our plans. Its good

to make arrangements well in advance.

the
I think we should all get together some time soon to coordinate our plans. One of th
is **; or ,and** **going**
engineers from production are going three are goin from Chris' area. None of Fran's
is **; however** or **although** **were**
team are going, however though I wish it was possible.

bring
I've asked Mo to take my notes from the last meeting when she comes to our planning
me, **attending** **, too**
session. Between you and I Sandy, Mo should be attendin the convention to.
should profit **attendance** **valuable**
XYZ shiuld profgit by our attendants. We made a lot of voluable contacts last year--
[omit all] **affected** **margin**
-contacts that effected our profit marsghin.

Let's discuss this.
Signature (if a written letter)
P.J.

Exercise 6.2
Writing a Business Letter

Instructions:

In this exercise, you will read about an incident experienced by a customer service worker. As you will see, the customer service worker agrees to write a letter to help deal with the customer's problem. You are to assume the role of the customer service worker and write the letter. Remember the writing process: plan, translate, and revise. Use the questions for evaluating one's writing during revision.

Incident:

You are a customer service representative for Fantasycard, a general credit card company. A customer calls and says, in a very irritated voice, "You people just totally screwed up my bill. You can't do anything right!" You aren't very happy about this but you know you should not take his anger personally (especially now that you are aware of the personal side of job performance). You say, "Sir, I would like to help you. Please give me your account number and describe your situation." He replies," You people posted my $83.00 payment as $683.00 and that has caused eight of my checks to bounce. I can't believe anyone could make such a stupid error. That mistake has cost me $20.00 per check and I demand that I receive a check for those charges." The customer is now on the verge of hysteria and you don't really blame him.

You take control of the call by apologizing for the error and assuring him he will get satisfaction. You tell him," I will send you a check for $600.00 to cover the difference in the amount within 5 days. I will also send a separate check for $160.00 to cover 8 service charges of $20.00. I will also draft a short letter for any creditor who had a returned check explaining the posting error so your credit will not be hurt by this."

Additional Information:

Your company name and address: Fantasycard, Corporate Offices, 1500 Linden Drive, Hackensack NJ 07602.

Customer name and account number: Brian Leonardi, 6623 7284 9952 7631

Creditor's name and address: Bennalong's, 16 Railroad Avenue, Tenafly NJ 07630.

Now, Write the letter.

Exercise 7.1

Directions

Pretend that you are a customer service representative for a consumer protection agency. You are responsible for telling customers if their car has any recent recall notices. The company has provided you with a set of questions designed to help you make decisions. These are sometimes called flowcharts. You are to use the flow chart to answer the following customer requests. If a feature isn't mentioned in the customer request, you can assume that the car doesn't have it.

Requests

1. I have a 1989 Intrepid with a hatchback.
2. Has my 1987 Explorer been recalled? It's a two-door with automatic transmission.
3. Does your chart show anything for a 1985 Enterprise with front-wheel drive and a sunroof?
4. I'm calling from my car. Has a 1990 Enterprise four-door been recalled?
5. Can you tell me anything about a 1983 Explorer? It's the two-door model and it has air conditioning.
6. I've got an Intrepid that's a piece of junk. It's the 1984 model with two doors, power door locks and reclining seats.
7. It's a 1991 Explorer with four doors and an automatic transmission.
8. I have a 1989 Enterprise with power steering and power brakes.
9. Do you have any information on a 1984 Intrepid hatchback?
10. Has my 1982 Explorer been recalled? It has two doors and a sunroof.

Exercise 7.1 Answers

Directions

Pretend that you are a customer service representative for a consumer protection agency. You are responsible for telling customers if their car has any recent recall notices. the company has provided you with a set of questions designed to help you make decisions. These are sometimes called flowcharts. You are to use the flow chart to answer the following customer requests. If a feature isn't mentioned in the customer request, you can assume that the car doesn't have it.

Requests

1. I have a 1989 Intrepid with a hatchback.
   (B) faulty hatch lock
2. Has my 1987 Explorer been recalled? It's a two-door with automatic transmission.
   (F) cracked steering column
3. Does your chart show anything for a 1985 Enterprise with front-wheel drive and a sunroof?
   (D) faulty sunroof release
4. I'm calling from my car, has a 1990 Enterprise four-door been recalled?
   (C) faulty door locks
5. Can you tell me anything about a 1983 Explorer. It's the two-door model and it has air conditioning.
   (H) air conditioner leaks
6. I've got an Intrepid that's a piece of junk. It's the 1984 model with two doors, power door locks and reclining seats.
   (A) no recall notices
7. It's a 1991 Explorer with four doors and an automatic transmission.
   (C) faulty door locks
8. I have a 1989 Enterprise with power steering and power brakes.
   (E) electrical shorts
9. Do you have any information on a 1984 Intrepid hatchback?
   (B) faulty hatch lock
10. Has my 1982 Explorer been recalled? It has two doors and a sunroof.
    (D) faulty sunroof release

Exercise 8.1
Problems

1. The credit card company offered Mr. Alexander his choice of two cards: a card with an annual fee of $50.00 and an interest rate of 12.5% or a card with no annual fee and an interest rate of 21%. which card should Mr. Alexander take if he wants to spend the least amount of money?

2. Last winter the Bakers spent the following amounts on their heating bill: $100, $128, $143, and $122. This year their heating bills went up 22%. What is their average monthly heating bill this year?

3. Using the menu from Fallen Arches, estimate the cost of a meal consisting of: 3 cheeseburgers, 1 order of mega-fries, 3 crispy apple pies. You have $10.00. If you have enough money left you can purchase soft drinks, if not, it'll have to be water.

FALLEN ARCHES
MENU

BURGERS OTHER STUFF

Wimpy .99 Size kids Normal
mega
Cheeseburger 1.19 French Fries .69
.89 1.25
Belt-buster 1.79 Crispy Pies
1.39
Burger of the Month 2.09 Cake
1.29
Ocean Special 1.89 Ice Cream
.89
Pork on a bun 2.49 Soft Drinks .59 .79
1.09

---

4. There are 8 flights daily between Portland and Chicago. If each plane can carry 283 passengers, how many people can make this trip each day?

5. The One Leg in the Grave Insurance Company reimburses it's policy holders for 70% of their medical costs. If you paid the hospital $298, how much would you be reimbursed?

Exercise 8.1 Answer Key
Problems

1. The credit card company offered Mr. Alexander his choice of two cards: a card with an annual fee of $50.00 and an interest rate of 12.5% or a card with no annual fee and an interest rate of 21%. which card should Mr. Alexander take if he wants to spend the least amount of money? There **is more than one possible solution to this problem. To come up with the best solution (Question 5), more information about Mr. Alexander's bill paying plans is needed (Question 3). If he intends to pay the entire bill each month, he should take the card with no annual fee. However, if he intends to make some big purchases and pay the minimum payment each month, he would probably be better off paying the annual fee and getting the lower interest rate.**

2. Last winter the Bakers spent the following amounts on their heating bill: $100, $128, $143, and $122. This year their heating bills went up 22%. What is their average monthly heating bill this year? **This problem has two parts, first we must determine this year's average and secondly, estimate the average increase. Using only the amounts over $100, add 0, 30, 40, and 20. Then 90 divided by 4 is between 20 and 25. So, when we add 100 back into our result, the average is 120 to 125. Better to budget higher than lower, so let's use $125. Next, we estimate 1/5 of 125 at 25 and add this amount to 125, so the new average should be $150. Our approximation is within $.37 of the actual amount.**

3. Using the menu from Fallen Arches, estimate the cost of a meal consisting of: 3 cheeseburgers, 1 order of mega-fries, 3 crispy apple pies. You have $10.00. If you have enough money left you can purchase soft drinks; if not, it'll have to be water.

FALLEN ARCHES
MENU

BURGERS			*OTHER STUFF*		
Wimpy	*.99*		*Size*	*kids*	*Normal*
mega					
Cheeseburger		*1.19*	*French Fries*		*.69*
.89 1.25					
Belt-buster		*1.79*	*Crispy Pies*		
1.39					
Burger of the Month	*2.09*		*Cake*		
1.29					
Ocean Special	*1.89*		*Ice Cream*		
.89					
Pork on a bun	*2.49*		*Soft Drinks*	*.59*	*.79*
1.09					

---

3 cheeseburgers at 1.20 = 3.60
order of mega fries 1.25= 1.25
3 crispy apple pies 1.40 = 4.20

These rounded calculations total $9.05 so there is enough money for soft drinks. Round up to be sure of having enough money. Are there other answers? Why?

4. There are 8 flights daily between Portland and Chicago. If each plane can carry 283 passengers, approximately how many people can make this trip each day? **We can estimate 8 X 300 but in reality, only 2264 can ever make the trip in a day.**

5. The One Leg in the Grave Insurance Company reimburses it's policy holders for 70% of their medical costs. If you paid the hospital $298, how much would you be reimbursed? **70% is the same as .7 x $300 = $210. Our estimate is over by about $1.40 but should be close enough.**

GLOSSARY

Vocabulary Terms for Basic Customer Service Skills Training

Word	Definition
backup	copying files from a hard drive to a floppy disk
boot	the operation that starts up the computer
break	to stop software from running
byte	used to measure the size of a file or the computer's memory size
capacity	the total amount of data that can be stored on a diskette or hard disk
command	information enter from keyboard that tell the computer what to do
CPU	Central Processing Unit. the brain of a computer's activities
cursor	the symbol that indicates where the next data entry will appear on the screen
data	pieces of information
data base	collection of facts used for a specific computer task or function
data file	a file in which information is kept
data processing	manual or computerized processing of data to get specific information
directory	storage bin for files, programs, or other directories
diskette	magnetic disk used for storing information
DOS	disk operating system, which allows data computers to run software
drive letters	the letters given to each drive to help the computer to identify them

Vocabulary Terms for Basic Customer Service Skills Training

Word	Definition
electronic mail	a system that allows computer users to exchange messages through the computer
file	a collection of information stored on a disk file under a specific name
file extension	the 3-character suffix added to a filename to identify the type of file
file management	the "housekeeping" tasks associated with organizing files
filename	a specific name given to a file in order to uniquely identify it
floppy	another name for a diskette
format	the procedure of preparing a diskette or the hard disk for arranging storage space
function keys	special keys that can be set up to perform many tasks with only one push
hard drive	a high-volume disk on which data can be store and retrieved
in process	a program that is at some stage of working
indicator light	a light that comes on when a particular condition occurs in the system
key board	a set of keys used to enter information into a computer
log off	the procedure used to exit from a computer system
main unit	the central unit of the computer which includes drives and memory
memory	the internal "working" memory of the computer that is not the hard disk
menu	a list from which the user chooses a task for the computer to perform

Vocabulary Terms for Basic Customer Service Skills Training

Word	Definition
monitor	an electronic device (like a television) used to display words and images
mouse control	device used for pointing at and controlling objects on a display screen
MS DOS	a program that is important for performing basic tasks on the computer
on line	the time a computer is on and working
output	computer information delivered by way of a printer, monitor, or similar device
password	a code word, known only to you, that is used in the log in process
program	instructions that tell a computer how to perform tasks
program files	files that contain program instructions as opposed to files with "raw" data
prompt	a symbol displayed on the screen that indicates that the computer is ready
reset	restarting the computer without turning the power switch off and on again
software	the program that instructed or controls computer operations
user	anyone who uses a computer or operating system
window	a group of different screens in which you can work using system commands
work station	computer system terminal used for the input and output of information
write protect	protecting the information on a diskette from being accidentally erased
abandoned calls	calls that never reached a telephone specialist because the caller hung up

Vocabulary Terms for Basic Customer Service Skills Training

Word	Definition
after call time	time required after a call to complete the record of that call
after market	companies that develop the accessories or parts for a product
answer machine	play and records messages when the called party is unavailable
authorization	legal customer acceptance of a product or service
automatic dial	device that automatically dials preset telephone numbers
benefit selling	selling based on how a product's capabilities will meet a particular need
benefits	the way the features of a particular product will positively affect a customer
blockage	when all telephone circuits are busy so that no other call can be carried
blocked calls	calls that are not completed because a customer receives a busy signal
boiler room	place where selling lacks professionalism due to a call volume and high pressure
burnout	poor performance or lack of motivation in an employee due to pressure or stress
business sales	business-to-business telemarketing
call planning	preparation before a sales call, for an effective response by a telemarketer
call system	provides automatic and equal distribution of incoming calls
close-ended	a question used to get specific, one word responses
cold calls	sales calls to prospective customer

Vocabulary Terms for Basic Customer Service Skills Training

Word	Definition
consumer	a person who buys things
cross-selling	selling an additional product or service usually related to a customer
customer sales	business-to-customer telemarketing
cycling	planned periodic re-contacting of a customer
demographic	personal information or statistics about an individual or group
direct dialing	allows a person to receive calls without assistance from an operator
direct response	action taken as a result of receiving advertising messages
features	a characteristic of a product that never changes
follow-up	system that schedules future customer contacts
guided script	a script with key sections and words used as prompters to personalize a call
hotline	allows customers to call a specified number for information or problems
in-house sales	telemarketing performed by trained internal staff to market and sell products
inbound	calls that are received at a customer service center
inside sales	telephone sales as opposed to field sales
monitoring	listening to and evaluating a call in order to develop telephone skills
open-ended	a question that prevents simple yes/no answers

Vocabulary Terms for Basic Customer Service Skills Training

Word	Definition
order process	recording and processing orders phoned in by customers
private line	telephone line that is designated for individual use
product data	provides customers with information on various products or service
profile	contains buying history, payment, demographics, and product information
qualified leads	customer who has met defined criteria for acquiring a product or service
response time	time between a request for information from a computer and when it is received
sale	customer acceptance of the product, as well as customer verbal authorization
script	instruction guide to follow when accepting or placing calls
social skills	ability to listen, be friendly and present self and ideas clearly and concisely
speed of answer	average length of time it takes to answer all calls during a time period
talk time	average length of time representatives talk on calls during a measured period
telemarketer	salesperson who has sales and service responsibilities for assigned accounts
toll-free	calls made to 800 numbers to the caller and are paid for by the receiver
trustworthy	a caller who can establish a good working relationship with customers
verification	verbal authorization for a sale by a customer
volume accounts	customer accounts with a large number of transactions over a period of time

S.C.◎.R.E.

Sales and Customer Service
Occupational Readiness Education

SOFTWARE REFERENCE GUIDE

The contents of this courseware were developed under a grant awarded to the American Telephone and Telegraph Company (AT&T) from the U.S. Department of Education, National Workplace Literacy Program (Project Award Number V198A20062). The contents do not necessarily reflect the position or policies of the U.S. Department of Education.

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pursuant to Company Instructions

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Introduction

Introduction

Welcome! The *Sales and Customer Service Occupational Readiness Education* software is a comprehensive, industry-centered, model program designed to teach entry-level workers and trainees the basic skills necessary to succeed in the customer service industry. Supervisors have reported a growing need for employees who are flexible, comfortable with new technology, and adept at problem solving. This training program will address these needs and provide a solid foundation for employee advancement.

Specifically, this project focuses on the basic skills needed in the customer service areas of information sharing, simple customer contact, complex customer contact, and sales. The courseware, which is designed especially for moderate level (grades 6-9) readers, is divided into several instructional modules. Module 1 explains how to use the computer and the courseware. The other modules teach the most common basic skills required for reading, interpreting, and problem solving involving the use of charts, manuals, forms, and computers. Each module is divided into simulated real-life tasks the student must complete. The examples of the tasks include: reading, filling out forms, or finding information on a chart. Students build their basic skills by doing actual job assignments.

This courseware is a collaboration between the Institute for the Study of Adult Literacy at The Pennsylvania State University, AT&T, and Florida Community College-Jacksonville.

The Institute was established in 1985 under the direction of Dr. Eunice N. Askov, professor of education. The Institute's mission includes developing a sound research base in adult literacy, leading and coordinating adult literacy services, and improving practice. Each of the Institute's projects results in a practical application in the field, including collaboration between researchers and practitioners, staff development recommendations, and publications of research findings. The Institute's track record in research and development of technology-based instructional models has earned international recognition, making it a leader in the field of adult literacy.

Chapter 1

IBM System Requirements

This courseware requires the following hardware components:

One of the following computers:

- IBM PC, PS/2, or 100% IBM-compatible clone
    - * 80386 or 80386SX (80486 strongly recommended)
    - * 16Mhz clock speed (20+ Mhz strongly recommended)
    - * 2 MB RAM (4 MB RAM strongly recommended)

The following graphics adapter:

- 16 color VGA or better

- a monitor (monochrome or color, color recommended)

- a hard disk drive (20 MB needed for the courseware)
    - * 30 msec. access time or less recommended

- a mouse

- one floppy drive (either 360K, 720K, or 1.44 MB)

- printer (optional, but recommended)

In order to see graphics on your computer, you must have a graphics adapter installed. In older machines, this option was installed manually. Most newer machines come with some type of graphics adapter built-in. This courseware operates in VGA mode.

A color monitor or screen is recommended. Many educational and business software programs are more aesthetically pleasing in color. Color is used in the courseware to enhance instruction.

A hard disk drive is a storage device equivalent to many floppy disks in terms of capacity. This courseware is simply too large to be used on floppy disks; you would need more than a dozen of them and would have to be switching from one floppy to another continuously. A hard disk allows you to copy all the information from the floppy disks you received with this courseware onto it. Once the information from the floppy disks is copied to the hard disk, it is easier to access and manage.

A mouse is an alternative to the keyboard. Traditionally, learners were forced to use the keyboard to interact with computer software. This was difficult for learners with little or no keyboarding skills. It also broke their concentration by forcing them to look at the screen, hunt and peck on the keyboard, and look back at the screen. The mouse is a hand-held device that you roll around on the table. As you do, a corresponding pointer moves about on the computer screen. You roll the mouse around until the pointer is where you want it and then press a button on the mouse to perform some action. Your eyes never have to leave the screen. This courseware will not work without a mouse.

You must have at least one floppy drive for the Learner Data Disk. All learners have a Learner Data Disk upon which their records are stored.

Your computer must have 2 MB (Megabytes) of RAM (Random Access Memory) installed. If it does not, the courseware will behave erratically and frequently will not work at all. Four MB of RAM are strongly recommended; this will prevent any out-of-memory conflicts.

A printer is optional, but recommended if you have any desire to print any of the learner information kept on the Learner Data Disk. A computer without a printer is like a car without tires.

Software

In addition to the software that comes with this courseware, the following software is required for successful use:

- IBM DOS 3.3 or greater

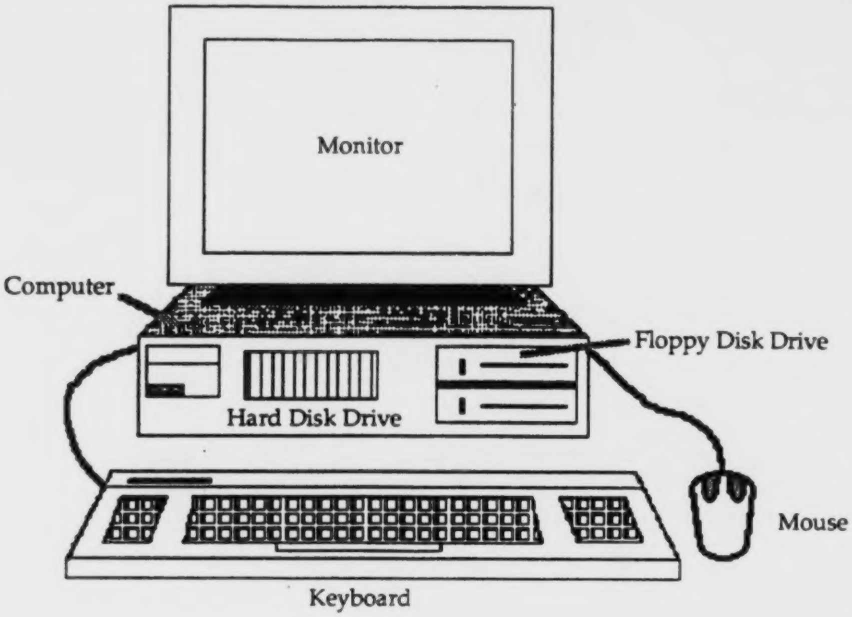
The courseware requires IBM DOS (Disk Operating System) to work. DOS is also called MS-DOS (Microsoft Disk Operating System) after the company that created and markets it. DOS is not included with the courseware; it must be purchased separately. If you do not have DOS, you must obtain it before you can do anything else. Most commercial software requires DOS to function.

NOTE: You should avoid DOS 4.0. DOS 4.0 has several undesirable features. DOS 5.0 is recommended.

- Windows 3.1 or better

The courseware requires Windows 3.1 to run. Windows is shipped with most new computers, and is available at a reasonable cost.

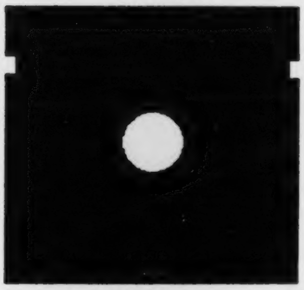
IBM System


Monitor
Computer
Floppy Disk Drive
Hard Disk Drive
Mouse
Keyboard

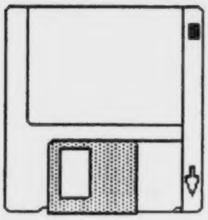
Types of Learner Data Disks

Each disk holds the same information. You will use one of these four types of disks, depending on what type of floppy drive you have.

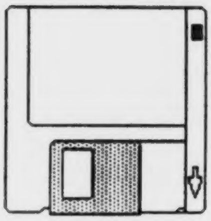
360K Floppy



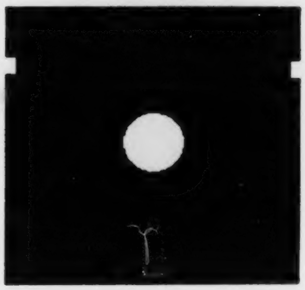
720K Floppy



1.44 MB Floppy



1.2 MB Floppy



Macintosh System Requirements

This courseware requires the following hardware components:

- Macintosh Plus or better
- a large screen (640 by 480 pixels or bigger) monitor
- a hard disk drive (20 MB needed for the courseware)
- a mouse
- one floppy drive (either 400K, 800K, or 1.4 MB)
- 2 MB RAM (4 MB required for System 7)
- a printer (optional, but recommended)

You must have a monitor of at least 640 by 480 pixels. You will have to attach an external monitor to the Mac Plus, Classic, SE, SE/30, and LC line. The built-in monitor is too small for these models (512 by 342 pixels for the Plus, Classic, and SE, and 512 by 384 for the older LC). A color monitor or screen is not necessary, although color is used to enhance instruction.

A hard disk drive is a storage device that has storage capacity equivalent to many floppy disks. This courseware is simply too large to use on floppy disks; you would need more than a dozen floppy disks and would have to be continuously switching from one floppy to another. A hard disk allows you to copy all the information from the courseware floppy disks onto it. Once the information from the floppy disks is copied to the hard disk, it is easier to access and manage.

A mouse is an alternative to the keyboard. Traditionally, learners were forced to use the keyboard to interact with computer software. This was difficult for learners with little or no keyboarding skills. It also broke their concentration by forcing them to look at the screen, hunt and peck on the keyboard, and look back at the screen. The mouse is a hand-held device that you roll around on the table. As you do, a corresponding pointer moves about on the computer screen. You roll the mouse around until the pointer is where you want it and then press a button on the mouse to perform some action. Your eyes never have to leave the screen. This courseware will not work without a mouse.

You must have at least one floppy drive for the Learner Data Disk. All learners have a Learner Data Disk where their records are stored.

Your computer must have 2 MB (Megabytes) of RAM (Random Access Memory) installed. If it does not, the courseware will behave erratically and frequently not work at all.

Four MB of RAM are recommended for the best performance. On machines with only 2 MB RAM, it may be necessary to remove all INIT programs. INIT programs run when your computer starts and add features (like sounds, screen savers, etc.) the Macintosh normally does not have. Some of these INITs take a great deal of RAM to run and thus may interfere with the courseware.

A printer is optional, but recommended if you plan to print any of the learner information kept on the Learner Data Disk. Most learners will request a printout of their work. You may require printed data for your own records. A computer without a printer is like a car without tires.

Software

In addition to the software that comes with this courseware, the following software is required:

- Apple System Software 6.0.7 or better

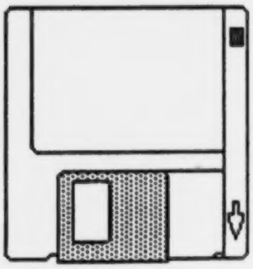
System software comes with your computer when you purchase it. To check your computer to see which version of system software you have, select the About the Finder... choice from the Apple Menu when you are at the Finder (also called Desktop) Screen. You may have to update your system software to run this courseware. If so, contact your local Apple dealer for details.

The courseware runs more smoothly on computers with faster clock speeds. (If you don't know what that is—just remember—the faster the clock speed, the better). The Mac SE/30 and Mac II line have a faster clock speed than the Mac Plus, Classic, or SE. If you have not yet purchased your equipment, keep this in mind.

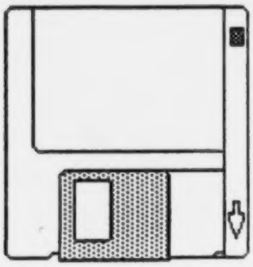
Types of Learner Data Disks

Each disk holds the same information. You will use one of these three types of disks, depending on what type of floppy drive you have.

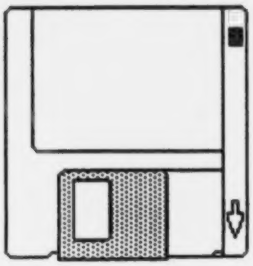
400K Floppy



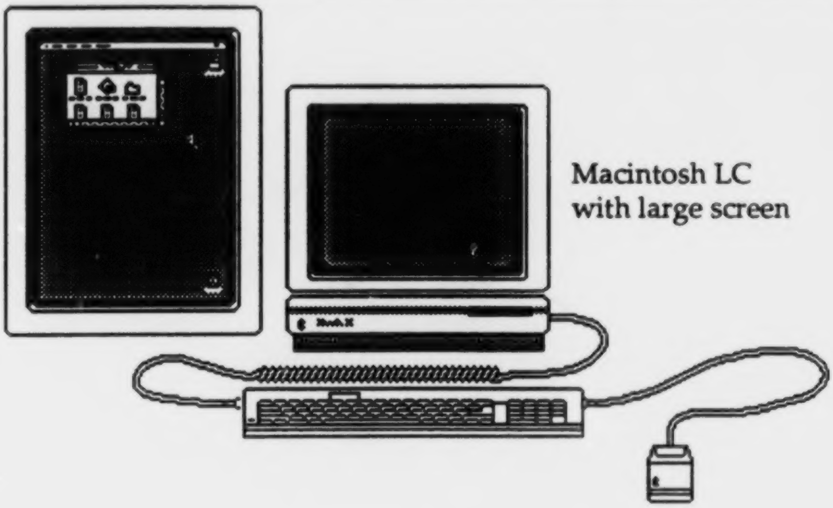
800K Floppy



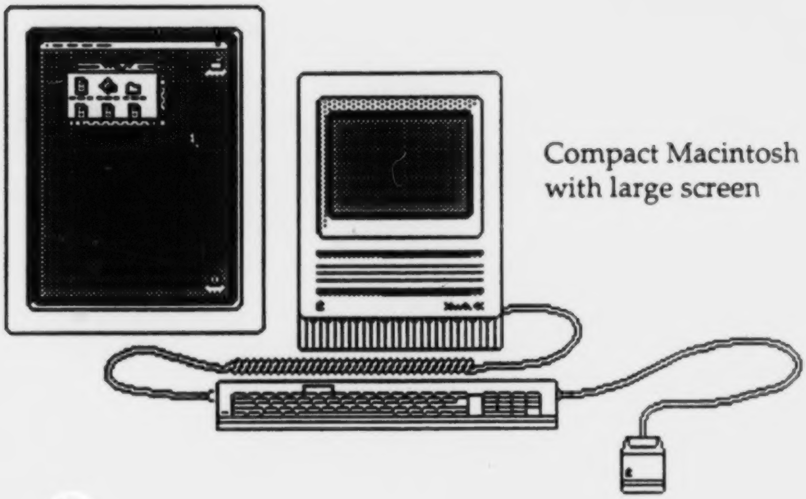
1.4 MB Floppy



Types of Macintoshes

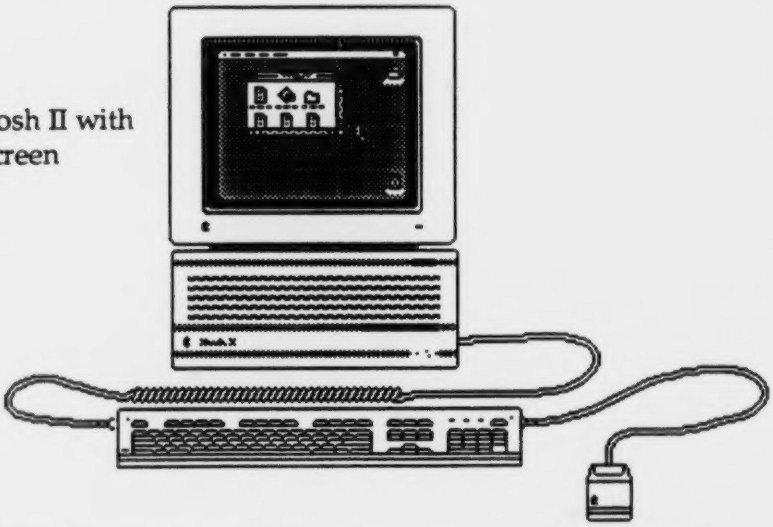


Macintosh LC with large screen



Compact Macintosh with large screen

Macintosh II with large screen



Install Procedure—IBM

Some technical terms are used in this section that you might not be familiar with. If you see a term you don't understand, please consult the Computer Terms Glossary in the Appendices for a definition.

Hardware

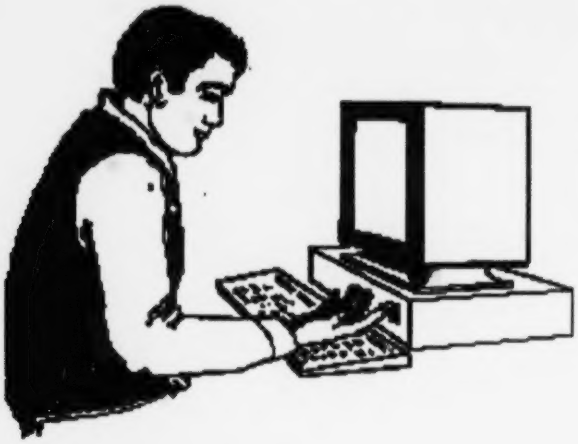
Your computer should be up and running at this time. DOS and Windows must be installed on your hard disk. See the "System Requirements" section if you have any questions about your hardware. Please check to make sure that your hard disk and monitor are functioning correctly before you proceed. You do not need to make any special adjustments to your computer to use this courseware.

Software

The disks you received are your master set. You may wish to make a backup copy of the master set at this time. You are entitled to make one backup of this courseware for archival purposes. This is optional and the choice is yours. If you make a backup set, use it for the procedures on the following pages. Put the original master set aside in a safe place. Instructions for making backups are located in the Appendices.

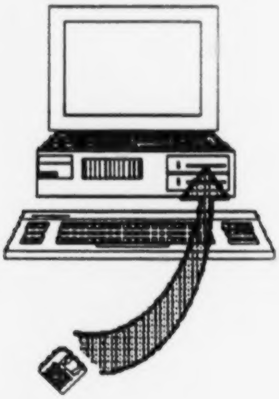
You cannot run the software directly off the floppy disks you received with this courseware. You must copy the software onto your hard disk first and then run it from the hard disk. This procedure normally can cause many problems if you lack expertise, but the provided installation program takes care of 90 percent of the dirty work.

The following pages will guide you through the installation process.



1. **Turn on the computer and start Windows.**

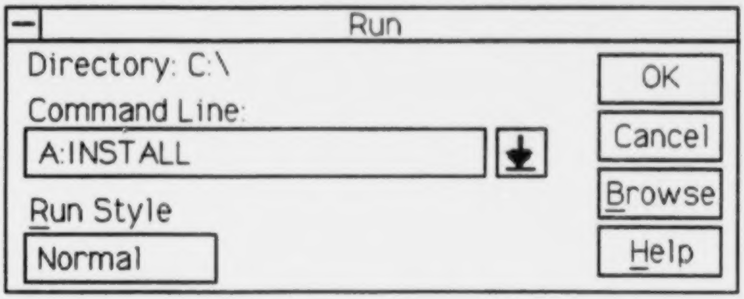
   You should allow at least one minute for it to warm up and run any self-tests it does. Make sure the monitor and any self-powered disk drives are turned on as well!



2. **Insert the first disk (disk #1) into the floppy drive.**

   If you have more than one floppy drive, insert it in drive A:. If you don't know which drive is drive A:, consult your computer manual.

HINT: The drive that lights up or makes noise first is usually your A: drive.



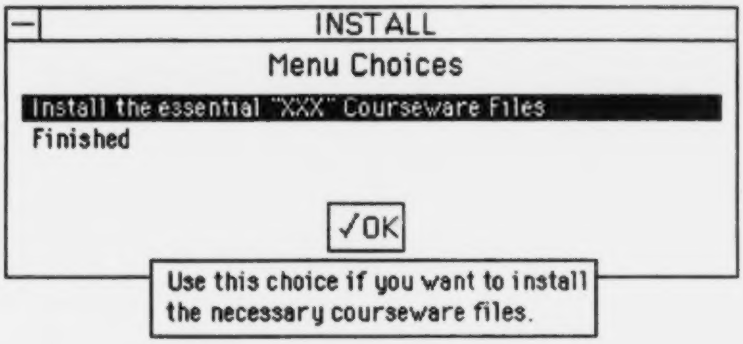
Directory: C:\

Command Line: A:INSTALL

Run Style: Normal

3. **Select Run from the File Menu in Windows, type A:INSTALL, then press Enter.**

   This tells Windows to run the Install program on the A: drive.



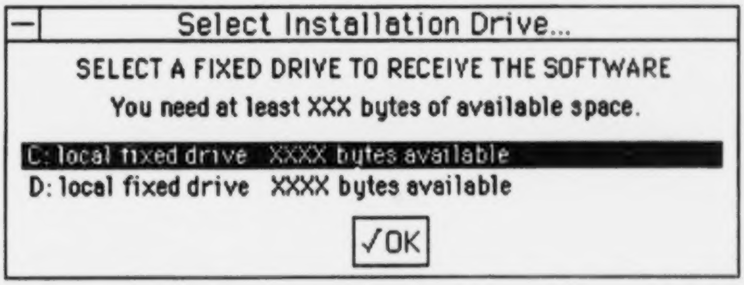
Menu Choices

Install the essential "XXX" Courseware Files
Finished

Use this choice if you want to install the necessary courseware files.

4. **At this point, you may install the courseware or quit the installation process.**

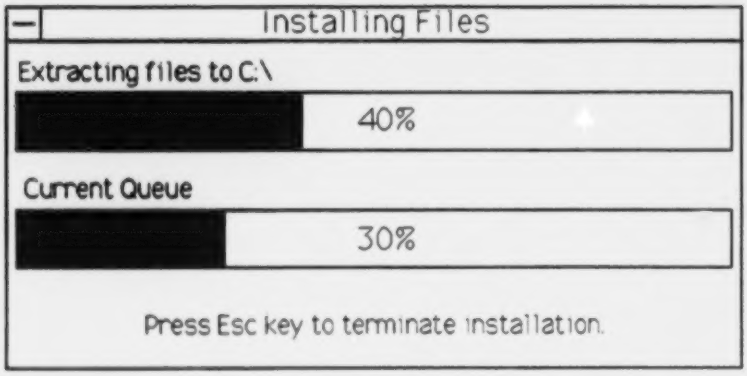
   Use the arrow keys to move the highlighted selection to your choice, then press Enter.



SELECT A FIXED DRIVE TO RECEIVE THE SOFTWARE
You need at least XXX bytes of available space.

C: local fixed drive XXXX bytes available
D: local fixed drive XXXX bytes available

5. **You must choose which hard drive (if you have more than one) to install the courseware on.**



Installing Files

Extracting files to C:\

40%

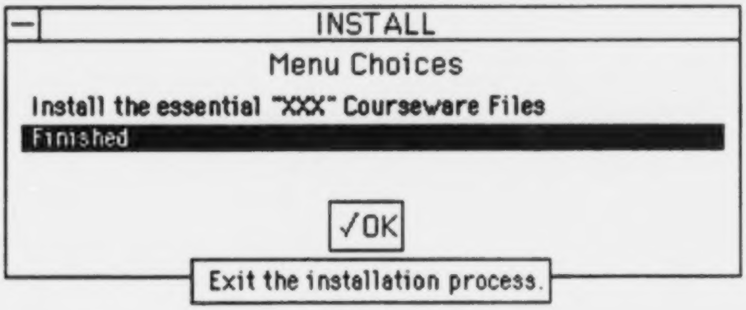
Current Queue

30%

Press Esc key to terminate installation.

6. **This dialog box shows you the progress of the installation.**

   You may be prompted from time to time to remove the disk in drive A: and replace it with the next disk in the set.



INSTALL

Menu Choices

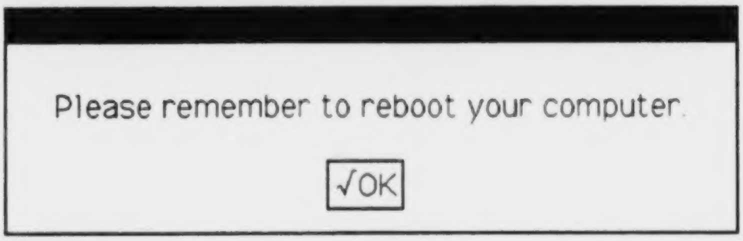
Install the essential "XXX" Courseware Files

Finished

Exit the installation process.

7. **When the installation is complete, this dialog box will reappear.**

   Press Enter to exit the installation process.

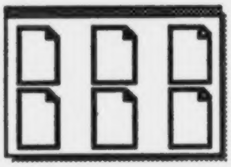


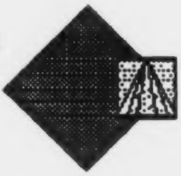
Please remember to reboot your computer.

8. **This prompt reminds you to restart your computer as soon as possible.**

   The installation has added several fonts and other files needed to run the software correctly. Windows will not recognize these files until you restart your computer and Windows again.

NOTE: You must restart your computer at this point for the courseware to operate correctly.

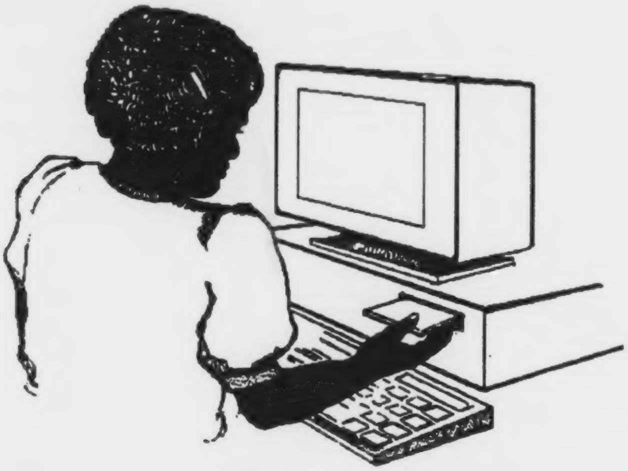




9. **A Program Group for the courseware is now on your desktop.**

   In this Program Group there is one Program Item named START. Double-click on this Program Item to start the courseware.

Install Procedure—Mac



Some technical terms are used in this section that you might not be familiar with. If you see a term you don't understand, please consult the Computer Terms Glossary in the Appendices for a definition.

Hardware

Your computer should be up and running at this time. See the "System Requirements" section if you have any questions about your hardware. Please check to make sure that your hard disk and monitor are functioning correctly before you proceed. You do not need to make any special adjustments to your computer to use this courseware.

Software

The disks you received are your master set. You may wish to make a backup copy of the master set at this time. You are entitled to make one backup of this courseware for archival purposes. This is optional and the choice is yours. If you make a backup set, use it for the procedures on the following pages. Put the original master set aside in a safe place. Instructions for making backups are located in the Appendices.

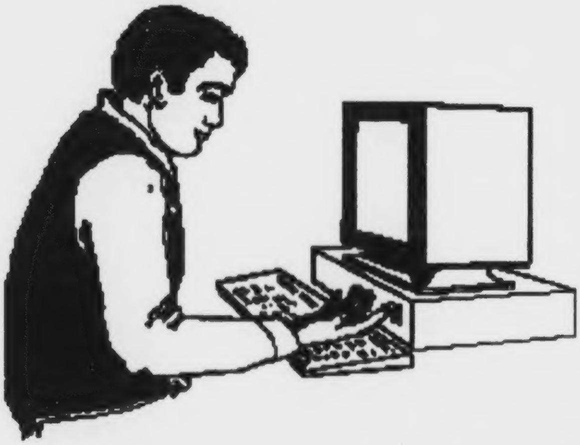
You cannot run the software directly off the floppy disks you received with this courseware. You must copy the software onto your hard disk first and then run it from the hard disk.

Certain INITs and CDEVs (software add-ons that give your system capabilities it wouldn't normally possess) may cause problems with the install program and/or the courseware itself. INITs and CDEVs are always located within the System folder on your hard disk. You can deactivate these INITs and CDEVs temporarily by dragging them out of the System folder onto your desktop and restarting your computer. After you install this program, you can reactivate them by dragging them back into the System folder and restarting your computer.

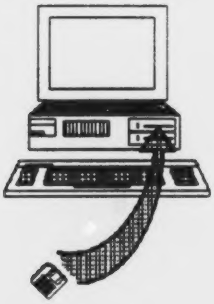
NOTE: In System 7, these files are probably located in the Extensions folder within your System folder.

INITs and CDEVs also take memory (RAM) away from the computer. If you are using a machine that has several Megabytes of RAM this will not present a problem. If you are using a machine that has less than two Megabytes of memory you may experience difficulties running this courseware. If this occurs, you should remove all nonessential INITs and CDEVs from your System folder.

The following pages will guide you through the installation process.

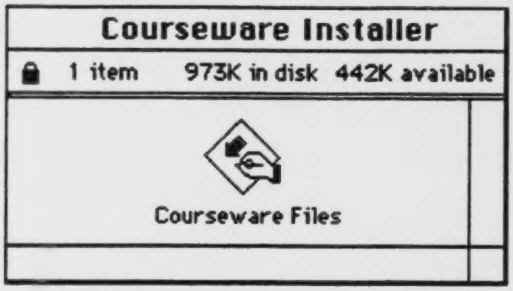


1. **Turn on your computer and allow it to warm up. Also, turn on the monitor and any self-powered disk drives.**



2. **Insert the first disk into the floppy drive.**

   Each disk is numbered. Look for disk #1.



Courseware Installer

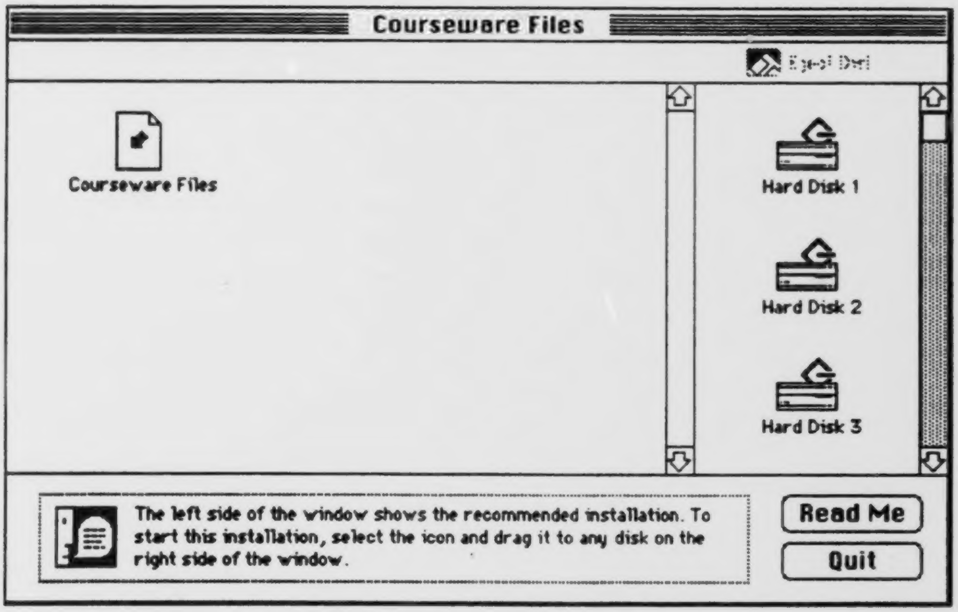
1 item 973K in disk 442K available

Courseware Files

3. **Double-click on the courseware icon.**

   Move the screen pointer on top of the courseware icon by moving the mouse about. Press and release the mouse button two times quickly.

4. **A Banner Screen will appear. Click the mouse to go on.**



Courseware Files
Eject Disk
Courseware Files
Hard Disk 1
Hard Disk 2
Hard Disk 3
Read Me
Quit

The left side of the window shows the recommended installation. To start this installation, select the icon and drag it to any disk on the right side of the window.

5. **When this screen appears, drag the file icon on the left to the appropriate hard drive on the right.**

   The installation will begin. You will be prompted for additional disks as needed. When the installation is complete, quit the program by clicking on the **Quit** button.

   If you ever need to remove the courseware from your hard disk, drag the courseware folder into the Trash Can.

Mini-Tutorial

The Mini-Tutorial will walk you through this courseware.

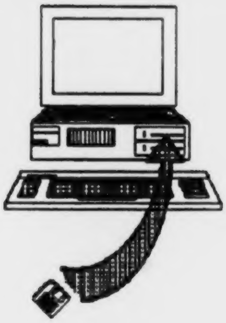
The Mini-Tutorial has two purposes:

- To help you get started using the courseware. Using any software is a learning-by-doing experience.
- To introduce key concepts at strategic points. These concepts will have more relevance when they are introduced in this manner, as opposed to being presented in abstract.

You should have copied the courseware onto your hard disk before you start this tutorial. If you have not done so, please refer to the "Getting Started" section before continuing! You also must have MicroSoft® Windows™ 3.1 installed on your computer for the courseware to work. The courseware is a MicroSoft Windows-based program. Please consult the appropriate manuals for more Windows information.

1. **Turn on the computer.**

   You should allow at least one minute for it to warm up and run any self-tests. Make sure the monitor is turned on as well!

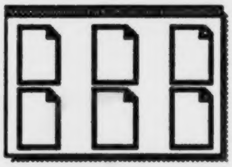


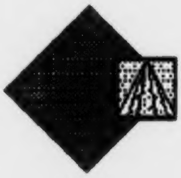
2. **Insert a Learner Data Disk in the floppy drive.**

   Learners MUST have their own Learner Data Disks. If you have ten learners, you need ten Learner Data Disks. You should take a Learner Data Disk you created and write the learner's name on it. (If you are using a 5.25" disk, use a felt-tip pen so you don't damage the disk!)

   If you have not created a Learner Data Disk yet, please do so at this time. Instructions for doing so are located in the Appendices.

One of the most wonderful aspects of computers is their ability to keep track of bits and pieces of information. Good courseware will keep track of virtually everything your learner does. This courseware keeps records of various things the learner does on a Learner Data Disk. When learners are finished using the courseware, you can check their Learner Data Disks to see what they did. This is explained in greater detail later in this tutorial.





3a. To start the courseware on the IBM:

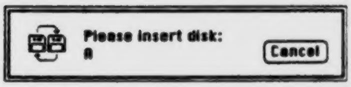
- Start Windows.
- Open the courseware Group icon by double-clicking on it, then open the Start icon that appears.
- This starts the courseware. You will always start at the Main Menu of the courseware.

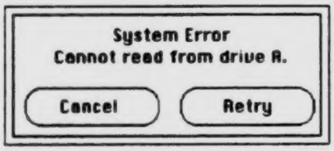
3b. **To start the courseware on the Mac:**

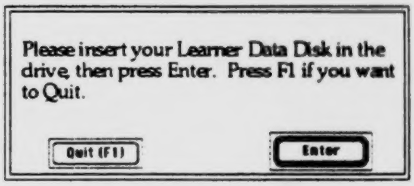
- Open the courseware folder by double-clicking on it, then open the Start icon that appears.
- This starts the courseware. You will always start at the Main Menu of the courseware.

4. **The next several screens are the introductory screens.**

You need not do anything here. If you want to move quickly through the introduction, just press any key after each screen appears.


Please insert disk:
A

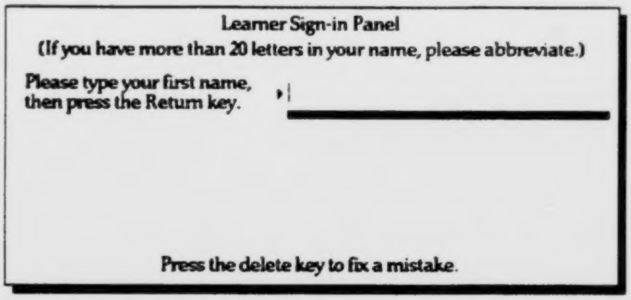

System Error
Cannot read from drive A.


Please insert your Learner Data Disk in the drive, then press Enter. Press F1 if you want to Quit.

5. **One or more of these screens will appear if you do not have the Learner Data Disk in the floppy drive.**

You must put a Learner Data Disk in the floppy drive and click on the **Retry** button. You cannot proceed beyond this point without a Learner Data Disk.

The courseware will not function without a Learner Data Disk in the floppy drive at all times. For more information on Learner Data Disks, please see the Courseware File Information section in this manual.



Learner Sign-in Panel
(If you have more than 20 letters in your name, please abbreviate.)

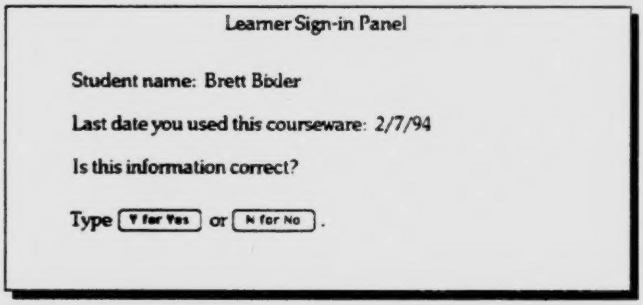
Please type your first name, then press the Return key.

Press the delete key to fix a mistake.

NOTE: The first name and last name are typed on separate lines. Type the first name and press Enter. Type the second name and press Enter.

6a. This is the initial Learner Sign-in Panel.

This panel only appears the first time a learner uses the courseware, or you choose to edit the learner name. Answer the questions, pressing the Return or Enter key after each response. Use the Delete or Backspace key to erase a mistake.



Learner Sign-in Panel

Student name: Brett Bixler

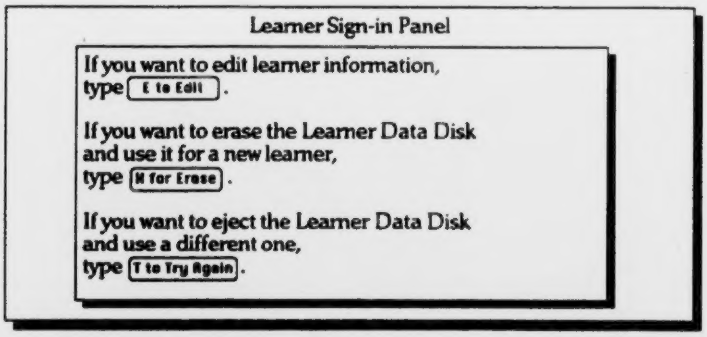
Last date you used this courseware: 2/7/94

Is this information correct?

Type Y for Yes or N for No.

6b. This is the normal Learner Sign-in Panel that will appear after the learner's information is entered. Type a Y if the information is right or N if it is wrong. Type E to edit the information.

This is the sign-in panel that you will most often see. It automatically appears in the learner's second and subsequent sessions with the courseware. Answer the question with a Y (for yes) or N (for no). If this is the correct Learner Data Disk, type a Y. If it is not the correct disk, type an N.



Learner Sign-in Panel

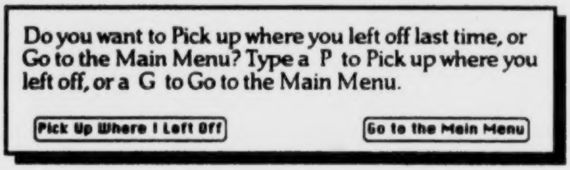
If you want to edit learner information,
type E to Edit.

If you want to erase the Learner Data Disk
and use it for a new learner,
type N for Erase.

If you want to eject the Learner Data Disk
and use a different one,
type T to Try Again.

6c. **This screen will appear if you type N.**

You may edit the learner name if there is an error of some sort in the learner's information (this will take you to the initial Learner Sign-in Panel), erase all information from the Learner Data Disk (useful if you want to reuse a disk), or switch Learner Data Disks (in case you put the wrong one in by accident). If you want to switch disks, you must exit the courseware and start it again.

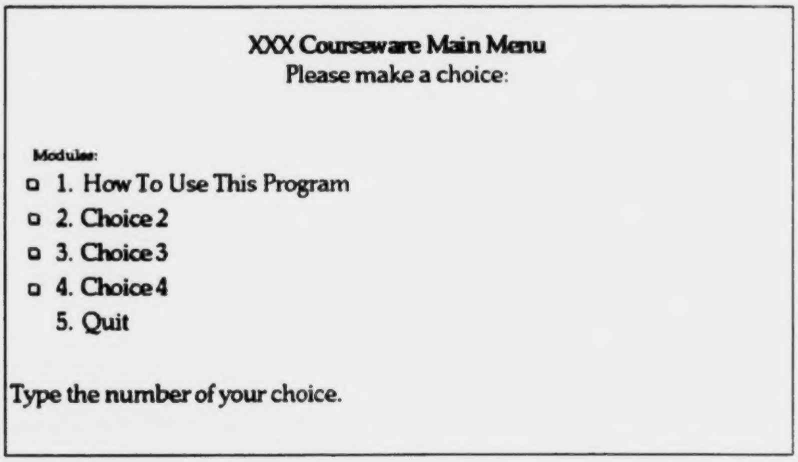


Do you want to Pick up where you left off last time, or
Go to the Main Menu? Type a P to Pick up where you
left off, or a G to Go to the Main Menu.

7. **This screen will not appear the first time a learner uses the courseware.**

It will only appear in the second and subsequent sessions. It is included here for continuity. A decision must be made here whether to resume where you stopped at the last session or to go to the Main Menu. Click on the button of your choice.

This feature is called a bookmark. If you are reading a book and want to put it down, you can insert a bookmark in it so when you return, you can start where you left off. This courseware has the same capability! No matter where you stop at the end of a session, you can always return to the same spot at the beginning of the next session. If a considerable amount of time has passed between sessions, you may want to take the learner to the Main Menu instead and start from there.



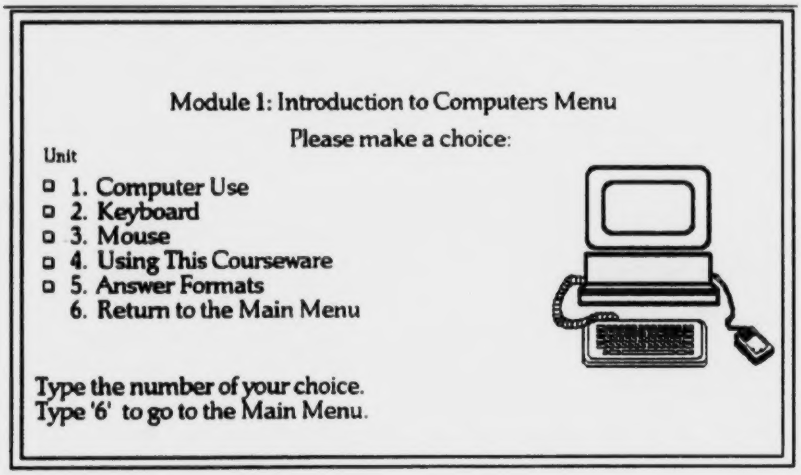
XXX Courseware Main Menu
Please make a choice:

Modules:
- ☐ 1. How To Use This Program
- ☐ 2. Choice 2
- ☐ 3. Choice 3
- ☐ 4. Choice 4
- 5. Quit

Type the number of your choice.

8. **This is the Main Menu. This graphic is only an example. Your menu will have different choices, but will work exactly the same.**

   Please type a 1. Do not type any other number at this time, or you will become lost! You need to go through each section of Module 1. Module 1 will teach you how to use this courseware. When you have completed Module 1, you will be familiar with all the important concepts you need to know to use the courseware effectively.



Module 1: Introduction to Computers Menu
Please make a choice:

Unit
- ☐ 1. Computer Use
- ☐ 2. Keyboard
- ☐ 3. Mouse
- ☐ 4. Using This Courseware
- ☐ 5. Answer Formats
- 6. Return to the Main Menu

Type the number of your choice.
Type '6' to go to the Main Menu.

9. **This is the Module 1 Menu. This graphic is only an example. Your menu may have different choices, but will work exactly the same.**

   To get started, please type a 1. You will eventually return to this menu. When you do, type a 2. When you return again, type a 3, etc.

NOTE: Do not proceed beyond this point in the manual without going through Module 1 first!

10. **Do not proceed with this step until you have gone through each menu choice in Module 1.**

    Now return to the Main Menu by typing an **m**.

    You should now have a firm grasp on how to control the courseware. One thing that was not taught in Module 1 was how to "back up" from one menu to another. At this time you need to "back up" to the Main Menu. There are two ways of doing this. The easiest way is to type an **m** (for menu). This will take you back to the Main Menu. The second way is to type the number of the last menu choice. Either method will back you out of one menu to the previous menu.

11. **You are now back at the Main Menu.**

    From here you may proceed with any of the sections (Modules) simply by typing the number of your choice. Each module and its menu works the same as Module 1.

Have fun with the courseware!

Chapter 2

Control Panel

The Control Panel is a set of buttons (small pictures you can click on with the mouse) that allows you to control the computer. This section will introduce you to the most common Control Panel buttons that appear at the bottom of the screen. If you are unsure what a button does and it does not appear here, click on the **Help** button for more information when you are running the courseware.

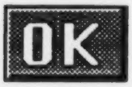
- **Learn About** button
  shows you a list of
  available lessons
- **Job** button
  shows you how to do the
  required tasks
- **Panic** button
  gives you tips about how
  to use the software
- **Look At** button
  lets you see something up
  close
- **Check My Work** button
  lets you to see how well
  you completed a task
- **Take Notes** button
  lets you write short
  messages and save or
  print them
- **Help** button
  tells you what the other
  buttons on the screen do
- **Menu** button
  takes you back to the last
  menu you saw
- **Exit the Program** button
  lets you quit the software
- **Previous Screen** button
  lets you look at a screen
  again (in a lesson)
- **Go Back** button
  lets you leave a lesson and
  return to the scenario

Other buttons may appear on the control panel in different lessons and scenarios. If the meaning of a button is not clear to you, click on the **Help** button. You will receive information on these buttons, as well as any other information that will help you.

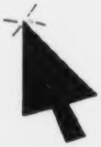
Using the Mouse

The mouse is an invaluable aid in educational software. It allows learners to focus their attention on the screen at all times, referring to the keyboard only when absolutely necessary. It also allows learners to manipulate objects on the screen to a much greater degree than the keyboard ever could. In this courseware, the mouse is used to perform the following functions:

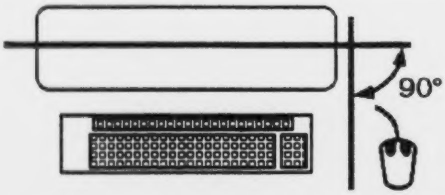
- click on buttons
- click on words and graphics
- drag an item from one place on the screen to another



Learners will often click on buttons. A button will look something like the graphic above. To use a button, move the tip of the mouse pointer on top of the button, then click the mouse button by pressing and releasing it in one smooth motion.

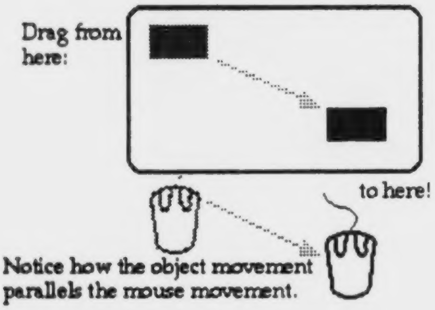


The tip of the mouse pointer is sometimes called the "hot spot" because this is the area of the pointer that must be placed on the object to click on it or drag it.



It is important to hold the mouse at right angles to the screen to ensure the mouse pointer moves correctly.

Learners will also click on words and graphics frequently. Learners will be asked to answer many questions by clicking on a word, sentence, or graphic. To do this, move the tip of the mouse pointer on top of the item, then click the mouse button by pressing and releasing it in one smooth motion.


Drag from here:
to here!
Notice how the object movement parallels the mouse movement.

Dragging an item from one place on the screen to another is yet another ability learners must master. Items may be textual or graphic in nature. To drag something, move the tip of the mouse pointer on top of the item to be moved, then press and hold the mouse button down. Without releasing the button, move (drag) the item to the desired location by moving the mouse. When the item is placed correctly, let go of the button.

Using Learner Data

Learner data is an invaluable aid when appraising a learner's progress. This courseware keeps track of two different kinds of data: a map of what lessons the learner has taken and a list of tasks the learner has performed for each scenario encountered.

Learners have their own floppy disk. All the information about a learner is stored on their Learner Data Disk. The size of the disk you will work with depends on what kind of floppy disk drive you have. All the files on a Learner Data Disk are text files. Text files are also called ASCII files. Text files consist of letters, numbers, special characters (!@#"\), return characters (which drop the text down to the next line), and tab characters (which indent text). Text files are called "universal" files because virtually every word processor, spreadsheet, and database can import information from a text file and put it to use.

MAP.TXT

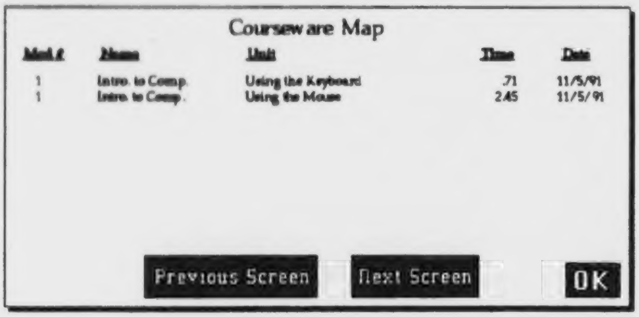
The map will tell you which lessons the learner has taken. It is stored on the Learner Data Disk in the file named MAP.TXT. The map file may help you pinpoint difficulties the learner has and enable you to prescribe appropriate remedial material. For example, if a learner is taking lessons on every memo encountered, you may want to provide some extra instruction on memos. Another example, your learner is going through a great deal of math instruction. You should provide some off-line (off the computer) math instruction for that learner.

TASKS.TXT

Each scenario has a list of tasks the learner must perform in order to complete the scenario successfully. This list is like a checklist or outline. Every time the learner does a scenario, this list (and how the learner did) is saved onto the Learner Data Disk in a file named TASKS.TXT. By examining this list, you can see how well the learner performed each task. This will help you to decide in which area the learner needs further instruction.

To access this information directly from the courseware, you must be at a menu (either the Main Menu or a Module Menu). While at a menu screen, use the Learner pull-down Menu located at the top of the screen. Move the mouse pointer on top of the Learner pull-down Menu. Click and hold down on the mouse button. Move the mouse pointer down to your choice. A window will appear showing you the learner's information.

Here is the Map window:



Courseware Map

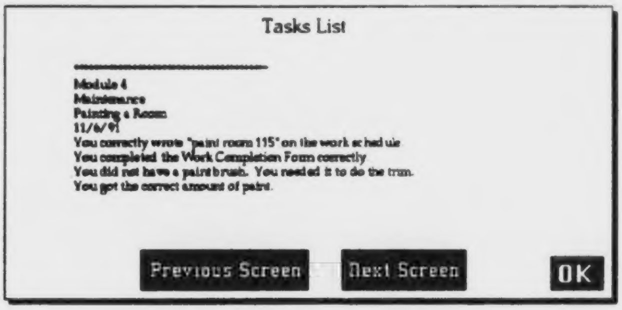
Mod #	Name	Unit	Time	Date
1	Intro. to Comp.	Using the Keyboard	.71	11/5/91
1	Intro. to Comp.	Using the Mouse	2.45	11/5/91

Each line gives you information on one lesson the learner took. The format for each line is:

Module Number <Tab> Module Name <Tab> Module Unit <Tab>
Time in Minutes Used <Tab> Date <Return>.

Only ten lines of information will appear at a time. Use the **Next Screen** and **Previous Screen** buttons to scroll through the information. Click on the **OK** button when you are finished.

Here is the Tasks window:



Tasks List

Module 4
Maintenance
Painting a Room
11/6/91
You correctly wrote "paint room 115" on the work schedule
You completed the Work Completion Form correctly
You did not have a paint brush. You needed it to do the trim.
You got the correct amount of paint.

Each scenario the learner does is shown as follows:

******************************** <Return>
Module <Return>
Module Name <Return>
Scenario <Return>
Date <Return>
List of Tasks <Return>
******************************** <Return>

Only ten lines of information will appear. Use the **Next Screen** and **Previous Screen** buttons to scroll through the information. Click on the **OK** button when you are finished.

You may want to access the Map and Tasks files from outside the courseware to make, analyze, and print more concise information than is possible from within the courseware. Information on the Learner Data Disk was stored as text files to allow you to use the word processor or spreadsheet you are familiar with. The drawback to text files is that you cannot have any special formatting, such as underlining or centering. This means the files you work with will need some adjustments if you plan to print the data neatly.

Once you have opened a text file, your word processor or spreadsheet can do all the special formatting to the file you require. If you use a word processor to view the data, you will probably have to adjust your tab stops to line up the different columns of information. When you save the changes you have made to the file, make sure you are saving it as a normal (not a text) file. Each word processor and spreadsheet deals with text files differently; please consult the appropriate manual for more information. You should back up all the files from the Learner Data Disk and make changes to the backup. Leave the original data intact.

Appendix A

Computer Terms Glossary

ABE: 0 to 4th-Grade Reading Level. Majority of instruction is spent on decoding skills (includes phonics), sight word vocabularies, word attack skills, and survival reading (charts, graphs, signs, etc.).

ABE+: 4th- to 8th-Grade Reading Level. Instruction concentrates on increasing reading comprehension through instruction on specific reading skills (main idea, inference, details), vocabulary development, guided readings, and survival reading (graphs, charts, tables, etc.).

Alphanumeric Key: A key that, when tapped, produces a letter, punctuation, or number on the monitor screen.

Alterable Software: The software can be changed. Text can be deleted, inserted, or altered, and/or questions modified, and/or proficiency level set.

Apple: Computer produced by Apple and compatibles that operate on a DOS 3.3 or ProDOS operating system (Apple GS computers are included but not Macintoshes). Generally software that runs on one Apple will run on another Apple. If using an Apple compatible, preview software on the hardware before purchasing; compatibility is not guaranteed.

Basic Math Skills: Arithmetic skills that range from single-digit addition through percents, ratios, and measurements.

Application Software: Programs designed to handle specific types of information and achieve useful results or answer problems: for example, database management, word processing, spreadsheets.

ASCII: American Standard Code for Information Interchange. The standard code used to transmit information within, to, and from computers. ASCII includes letters (upper and lower case), numbers, other symbols that can be made by holding the Shift key down while pressing another key (such as !, @, #), Tab characters, and Return characters.

Backup: A copy of a program or data file made by the user onto a separate storage medium, such as a disk or hard disk, so the original can be preserved against possible loss or damage.

BASIC: Beginners All-purpose Symbolic Instruction Code. A high-level language, standard on most microcomputers.

Baud: A bit of measurement used to specify the speed of data transmission in one second intervals. Usually used in reference to telecommunications.

Bit: The smallest unit of code for information occurring either as a 1, which indicates the presence of voltage, or as a 0 (zero), which indicates the absence of voltage.

Boot: To load a new program into RAM. May be done "warm" or "cold," meaning the computer is off.

Byte: Measurement of storage, a string of bits, generally eight, which is often used to represent a single character.

Branching: The ability of a program to alter its sequence according to user choices or responses. If the student enters a wrong answer, does the software explain why the answer is incorrect, does it offer additional examples/problems, does it reroute the student into a subsection, or does it simply tell the student that the answer is wrong?

CD-ROM: Computer Disk-Read Only Memory. A disk encased in a plastic coating which is "pitted" with electronic data and has an ultra-high density storage capacity which is read by a laser. Cannot be changed by the user.

Compatibility: Software compatibility refers to the ability to run programs on a variety of computers. Hardware compatibility means that various components may be connected directly.

Control Key: (1) A key pressed which initiates some kind of physical control action but which isn't printed on the output page: for example, line feed, tabs, paragraph indention; (2) Sometimes used in conjunction with other keys in order to define unique commands.

CPU: Central Processing Unit. The "brain" of the computer, the chip that orders information and directs it around the computer.

CRT: Cathode Ray Tube. Used for video display on a screen. Also see "Monitor."

Cursor: The line, flashing box, or other blinking symbol that appears on the monitor to show where the next keystroke will appear.

Data: Information that is put into a computer system and is then processed by a mathematical and logical operation so that it can ultimately be output in a sensible form.

Database: A collection of like records of information (i.e., mailing addresses, client profiles, book listings) that can be flexibly organized, sorted, reordered, or selectively retrieved.

DE: Developmental Education. Instruction designed to assist prevocational and precollege transfer students gain the necessary skills in reading, writing, and math to be successful with vocational and transfer curricula.

Desktop Publishing: The use of personal computers and application software combining text and graphics to design hard copy layout. Produces high-quality documents, such as periodicals, newsletters, and other materials.

Desktop Publishing System: A combination of hardware and software products used for desktop publishing, including a computer, layout or page-formatting software, and a high-resolution output device, such as a laser printer.

Disk: See "Floppy Disk," "Hard Disk," or "Micro-floppy Disk."

Disk Drive: The piece of hardware that reads floppy disks. You insert a floppy disk into a disk drive in order to use it.

Documentation: A collection of documents or information which describes a computer program information system or required data processing operations.

DOS: Disk Operating System. A collection of programs providing the CPU with specific instruction for transferring data from the disk to the computer and from the computer to the disk. Most commonly used DOS programs are those for formatting and copying (making backup) disks.

Electronic Mail: The transmission, storage, and distribution of text materials in electronic form over communication networks.

File: Data arranged under a single title (such as Annual Report) in RAM or on a disk.

Floppy Disk: A magnetized mylar wheel used to store data and programs outside the computer RAM. Disks measure either 5.25 inches or 3.5 inches in diameter and are sealed in a protective square cover which is lined with a software material that cleans the disk as it rotates.

Font: A group of type of one style and size.

Format (also Initialize): To prepare, via a program, a floppy disk to receive data according to the protocols of a particular DOS. No data can be written to a disk if it has not been formatted.

GED: Above 8th-Grade Reading Level. Instruction focuses on the skills needed to pass the GED (high school equivalency) exam. Instruction centers on building comprehension and increasing vocabulary, especially in topics related to social studies, science, math, and literature.

Hard Disk: Used to store data and programs outside of the computer's RAM. Hard disk systems have faster read/write access times, high storage capacity, and a greater reliability than do floppy or micro-floppy disk systems.

Hardware: The physical components of a computer (i.e., keyboard, printer, disk drive, CPU, monitor).

High-level Language: Programming languages designed for users to write instructions in English-like statements rather than in machine language.

High Resolution: The capability of producing and reading at least 256 lines or columns of dot patterns on a CRT. High resolution graphics produce an image that has the detail approximating that of a photograph.

IBM Family: Computers that use an MS-DOS operating system. These computers include IBM, Tandy, Compaq, and a variety of compatibles. It's especially important when purchasing IBM software to preview the software on the hardware that will be used to run that program.

Initialize: See "Format."

Input: Instructions or information going into the computer by keystroke, light pen, touch screen, mouse, or other device.

K: Kilobyte. 1024 bytes of memory.

Kerning: Placing letters relatively closer to or further from each other to make certain letter combinations look better.

Laser Printer: A printer that uses a laser beam to imprint page images onto paper.

Layout: The planning, design, and arranging of text and graphics on a page.

Light Pen: A hand-held optical character recognition device used for data entry into many types of terminals.

Load: To enter a program or data file into RAM from an external source such as a disk drive.

LAN: Local Area Network. A communications network which typically uses cables to connect computers within a limited physical area such as an office building.

Leader: Regularly spaced intervals of the same character to lead the eye from left to right across the page: for example, the dots in a table of contents between the end of a title and the page number.

Leading: The extra space between lines of printed text (rhymes with heading).

Management System: The record keeping system available with the software. The system can be extensive with multiple printout options or it can be a simple record of total correct answers. Not all software contains a management system.

Memory: The amount of "storage" space in a computer. If the computer does not have enough memory, the software will not run on it.

Menu: A list of command choices in a program displayed on the monitor for the user's convenience.

Micro-floppy Disk: Magnetized mylar wheel used for long-term storage of data and programs outside of the computer's RAM, encased in hard shells with a metal shutter to protect the media from damage due to improper handling or dust. The disks measure 3.5 or 5.25 inches in diameter.

Microprocessor: A chip, often the CPU, which is used to move data around or to perform calculations.

Modem: MOdulator-DEModulator. A device which makes it possible to transfer information between computers over telephone lines.

Monitor: Also called a screen or CRT. This TV-like device is what the user views information with.

Mouse: This hand-held control device can be used as an alternative to the keyboard in some programs. When you move the mouse around on the table, a corresponding pointer on the screen moves. It is available for the Apple IIe, IIc, Apple GS, Macintosh, IBM, and others.

Optical Disc Storage: Method of storing data which can be read by a laser. There are three main categories: prerecorded disks, disks that a laser drive can write on but not erase, and erasable disks.

Objective/Competency: Stated learning outcomes.

Operating System: The program by which the CPU operates.

Printer: This device is used to produce physical, hand-held paper documents, such as letters, graphics, etc.

Program: A set of instructions written in a computer language telling the computer how to process data or interact with peripherals.

Public Domain Software: Software available for minimal or no charge. Listings of public domain software can be found by contacting local and regional user groups, in many libraries, in national exchanges, and by contacting the editor of this publication.

RAM: RAM is temporary memory in the user's workspace. This is the portion of memory where a software program's instructions (such as word processing, spreadsheets, or database) are stored. RAM also holds the information created while using a software package: for example, a letter created with a word processing program. Usually, only one software program is stored in RAM at a time. When the computer is turned on, RAM is empty and when the computer is turned off, all of the instructions and data in RAM are erased. RAM is temporary and of finite size.

READ: The CPU reads or copies information from a disk to RAM (i.e., a program or data file).

ROM: Read Only Memory. Permanent system instructions built into the computer on chips, the CPU can read the instructions in ROM, but cannot write new ones into it.

Save: A common command to the computer, directing it to store the contents of RAM on a disk or other storage device.

Scanner: A device used to scan images and translate the images into a digitized form which can then be used by computer.

Software: Computer programs, the instructions by which the machine operates, which includes both systems-oriented programs (i.e., DOS) and applications programs (i.e., word processor, database).

Speech Digitizer: A device that has preprogrammed sound. It is closer to the human voice than speech synthesizers, but has a fixed vocabulary. The "Ufonic" is an example of this kind of hardware.

Speech Synthesizer: A device that can "read" any computer text aloud. Sometimes pronunciation is inaccurate or difficult to understand. The "Echo" line is an example of speech synthesizers.

Storage: The keeping of data or programs. Generally storage implies keeping a file outside of RAM, as on a disk or tape for long-term storage.

Telecommunications: The transmission or reception of signals by electromagnetic means. Usually pertains to the transmission of computer signals over telephone lines.

Word Processing: Writing software that allows the computer to resemble a typewriter. Generally the more expensive the program, the greater the formatting and printing options, and the longer it takes to master the program.

Write: The CPU writes or enters information from RAM onto a storage device such as a disk.

Appendix B

Formatting and Copying Courseware Disks—IBM

NOTE: If you have disk and file utilities installed on your hard drive, the following instructions may not work. Most disk and file utilities provide their own methods for formatting and copying disks. Consult the appropriate manual if this is the case.

IBM—Windows Copy Procedure

1. Open the File Manager in Windows. This program is in the Main Program Group when you first install Windows.
2. Select Copy Disk... from the Disk pull-down Menu.
3. A *warning* prompt will appear. Click on Yes to continue.
4. An *insert source disk* prompt will appear. Write-protect your original disk. (See the graphics on the following page.) This will keep it from being erased accidentally. If you have a 5.25" original, cover the write-protect notch with a piece of tape (see the illustration). If you have a 3.5" original, slide the write-protect tab up so you can see through the write-protect hole. Put the disk into the floppy drive.
5. A *copying disk* prompt will appear. Wait until an *insert destination disk* prompt appears. Remove the source disk. Insert the target (copy) disk in the same drive and click on **OK**.
6. After the copying is completed, label your freshly copied disk accurately.

IBM—DOS Copy Procedure

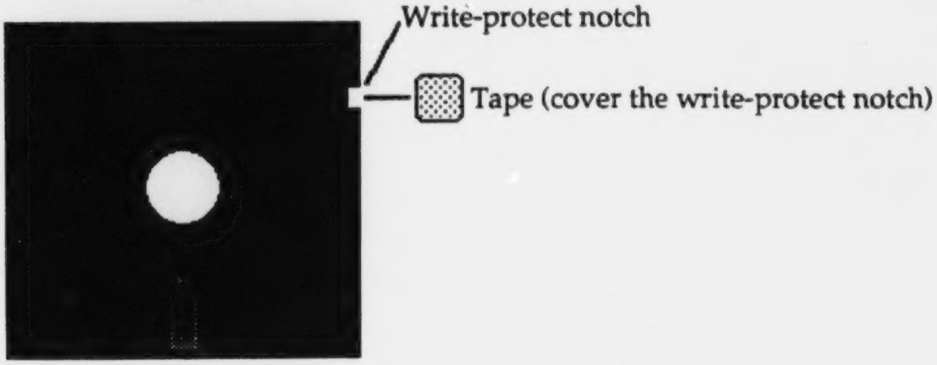
If you have one floppy drive, follow these instructions:

1. Write-protect the original disk. (See the graphics on the following page.) This will keep it from being erased accidentally. If you have a 5.25" original, cover the write-protect notch with a piece of tape (see the illustration). If you have a 3.5" original, slide the write-protect tab up so you can see through the write-protect hole.
2. Insert the original disk in the floppy drive.
3. Type DISKCOPY A: <Enter>.
4. The computer will prompt you to remove the original and insert the target disk. Insert the target (copy) disk in the drive and press Enter. You may have to repeat this step several times to completely copy the disk.
5. Label your freshly copied disk accurately.

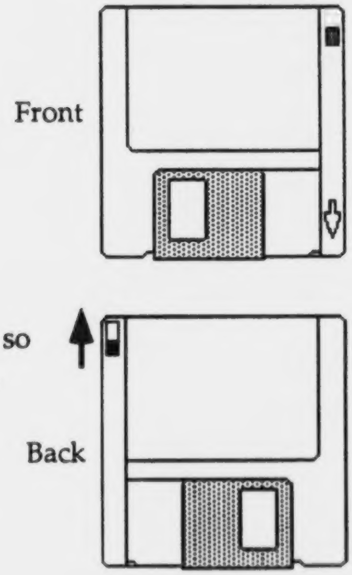
If you have two floppy drives the same size, follow these instructions:

1. Write-protect the original disk. This will keep it from being erased accidentally. If you have a 5.25" original, cover the write-protect notch with a piece of tape (see the illustration). If you have a 3.5" original, slide the write-protect tab up so you can see through the write-protect hole (see the illustration).
2. Insert the original disk in floppy drive A.
3 Insert the target (copy) disk in floppy drive B.
4. Type DISKCOPY A: B: <Enter>.
5. After the copying is completed, label your freshly copied disk accurately.

5.25" Floppy Disk


Write-protect notch
Tape (cover the write-protect notch)

3.5" Floppy Disk



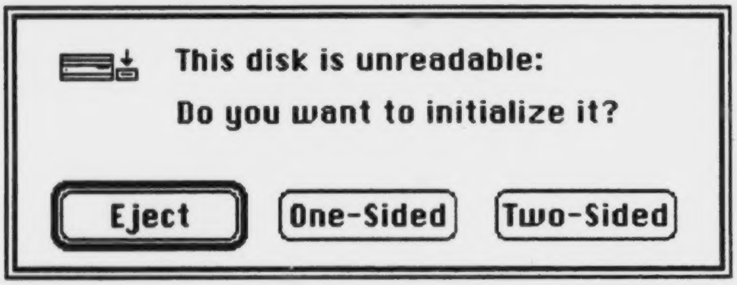
Slide write-protect tab up so you can see through hole.

Formatting and Copying Courseware Disks—Mac

NOTE: If you have disk and file utilities installed on your hard drive, the following instructions may not work. Most disk and file utilities provide their own methods for formatting and copying disks. Consult the appropriate manual if this is the case.

Formatting Floppy Disks

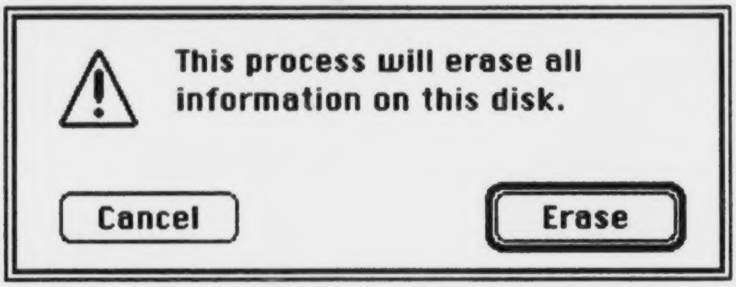
You must format (initialize) a floppy disk before you can copy any information onto it. Formatting a disk prepares it for use. New Learner Data Disks can be made by formatting a blank disk. To format a blank disk, insert it in the floppy drive. A dialog box similar to this will appear:



This disk is unreadable:

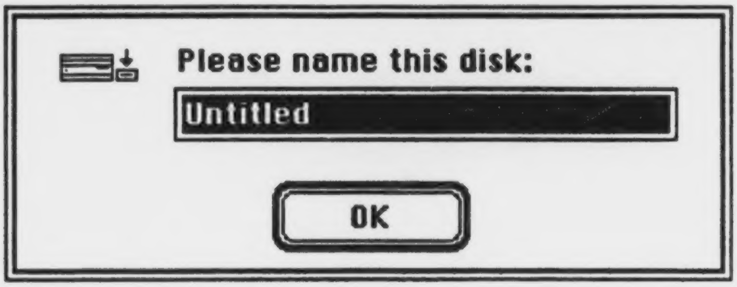
Do you want to initialize it?

Click on the **Two-Sided** button. This dialog box will appear:



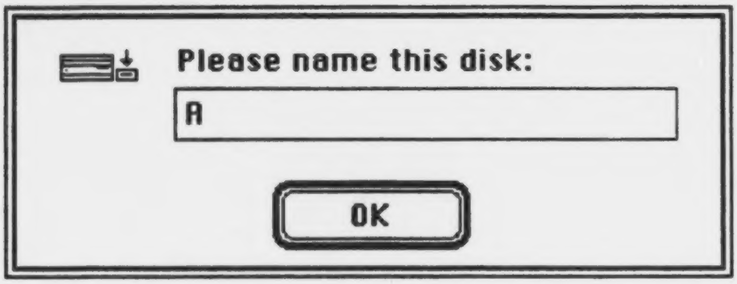
This process will erase all information on this disk.

Click on the **Erase** button to initialize the disk. This dialog box will appear:


Please name this disk:

Untitled

Type a name for the disk (remember, Learner Data Disks must be named A). The dialog box should look like this:


Please name this disk:

A

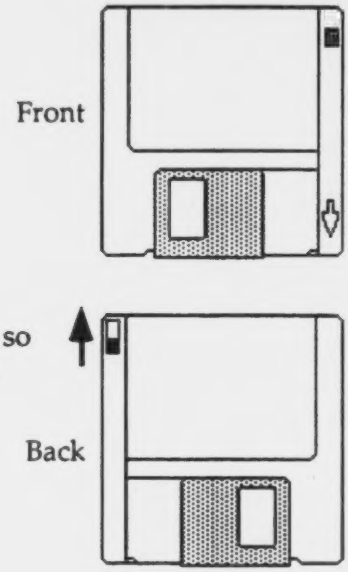
Click on the **OK** button. After about a minute, the disk will be initialized and ready to use.

Copying Floppy Disks—Mac

If you have one floppy drive, follow these instructions:

1. Write-protect the original (source) disk. This will keep it from being erased accidentally. If you have a 3.5" original, slide the write-protect tab up so you can see through the write-protect hole (see the illustration below).

3.5" Floppy Disk



Slide write-protect tab up so you can see through hole.

2. Insert the target disk in the floppy drive. (Initialize it if needed.)
3. Eject the disk by choosing Eject from the File Menu.
4. Insert the source disk into the floppy drive. Drag the source disk onto the target disk. You will see a prompt asking you if it is OK to copy. Click on the **OK** button. You may have to "swap" disks several times to completely copy the disk.
5. Label your freshly copied disk accurately.

If you have two floppy drives the same size, follow these instructions:

1. Write-protect the original disk. This will keep it from being erased accidentally. If you have a 3.5" original, slide the write-protect tab up so you can see through the write-protect hole (see the illustration above).
2. Insert the source disk in the first floppy drive.
3. Insert the target (copy) disk in the second floppy drive.
4. Drag the source disk onto the target disk. You will see a prompt asking you if it is OK to copy. Click on the **OK** button.
5. After the copying is completed, label your freshly copied disk accurately.

Appendix C

ISAL COMPUTER BUG REPORT

DIRECTIONS: If you have a problem with the software, please copy this sheet, complete the copy, and send it to us immediately. We will attempt to solve your problem as quickly as possible.

Date: ____________________

Name: ____________________
Address: ____________________
City: ____________________
State: ____________________
Zip Code: ____________________
Telephone Number: ____________________
E-mail Address: ____________________

Software Name: ____________________
Version #: ____________________

Machine:
Name/Type: ____________________
ROM (type and version): ____________________
Amount of RAM (memory): ____________________
Hard Disk(s) Size/Type: ____________________
Floppy Disk(s) Size/Type: ____________________
Printer(s) Name/Type (serial, parallel): ____________________
Monitor (CGA, EGA, VGA) (Radius, Apple, etc.): ____________________
DOS Version (for IBM): ____________________
System, Finder, Imagewriter, LaserWriter version (for Macintosh):
____
RAM Disk Size: ____________________
Cache Size: ____________________
Cards Installed & Slots Used: ____________________
AUTOEXEC.BAT File Printout (for IBM)[1]: ____________________
CONFIG.SYS File Printout (for IBM)[1]: ____________________

Problem:

Is the problem reproducible? (If yes, give approximate percentage):

What text/graphics appeared on the screen (if any):

(Note: Try pressing Control-N. If a screen number appears in the upper right corner of the screen, write down the information it contains here. Press Control-N again to hide this display.)

Steps needed to reproduce this bug:

Supporting information (printouts, screen dumps, etc.):

Other comments:

Send to: Software Bug Report
Institute for the Study of Adult Literacy
204 Calder Way, Suite 209
University Park, PA 16801-4756

1: You can obtain a printout of this file by turning your printer on and typing PRINT FILENAME.FILETYPE at the DOS C:\ prompt and pressing the Enter key (Example: PRINT AUTOEXEC.BAT). If you do not have a printer, you can list the file on the screen and copy it with pencil and paper by typing TYPE FILENAME.FILETYPE at the DOS C:\ prompt and pressing the Enter key (Example: TYPE AUTOEXEC.BAT).

Appendix D

Computer Equipment Requirement Quick Reference Guide

	Macintosh	**PC/Window Compatibles**
Computer	Macintosh LCII, IIsi or better	IBM/PC Compatible with 20Mhz 80386SX or better
Monitor	640 x 480 pixels or larger (for example Apple 12" monochrome or Apple 13" color)	Monochrome or color with VGA or better
Operating System	System 6 or greater	DOS 3.3 or later Windows 3.1 or later
Memory	4 Megabytes RAM for System 7	4 Megabytes RAM
Hard Disk Drive	5-7 Megabytes hard disk space (for each module loaded)	7-9 Megabytes hard disk space (for each module loaded)
Floppy Disk Drive	3.5" High Density (1.44 Megabyte recommended)	3.5" High Density (1.44 Megabyte recommended)
Peripherals	a printer (optional, but recommended)	a mouse a printer (optional, but recommended)

S.C.◎.R.E.

Sales and Customer Service
Occupational Readiness Education

INSTRUCTOR'S MANUAL

The contents of this courseware were developed under a grant awarded to the American Telephone and Telegraph Company (AT&T) from the U.S. Department of Education, National Workplace Literacy Program (Project Award Number V198A20062). The contents do not necessarily reflect the position or policies of the U.S. Department of Education.

S.C.O.R.E. 1994
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AT&T—PROPRIETARY (RESTRICTED)
Solely for authorized persons having a need to know
pursuant to Company Instructions

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Introduction

This *Instructor's Manual* is designed to familiarize you with the courseware. You should read through each scenario description prior to doing it on the computer. This will help you grasp any less-than-obvious concepts, as well as give you a mental map of what the scenario is designed to accomplish.

This manual can be used in teacher training. If you organize several teachers using this courseware, the manual will serve as one of your training tools.

This manual is also useful as a student guide. By copying the graphics and portions of the text, you can construct help instructions for your students.

Module 2: Information Sharing—Overview

Prerequisites: Mastery of Module 1: **How to Use This Program**

The Information Sharing Module teaches basic skills necessary for individuals who want to become customer service representatives whose primary duty is providing simple information in response to customer questions. Tasks are presented in the form of real-life simulations called scenarios. This module has the following job scenarios:

1. finding information on forms
2. finding information on charts
3. finding information in manuals
4. finding telephone numbers

The scenarios in this module require learners to find information from a variety of sources including charts, forms, manuals, and computer screens similar to those they would find on the job. The scenarios are as typical and realistic as possible to the real world.

Learners must be ready to take notes when required and should have a supply of paper and pencils handy at all times.

Instructional Aids for the Learner:

Learners will follow a prescribed path to successfully perform the tasks in these scenarios. The learner can obtain help in a variety of ways. If the learner needs help reading a particular item, such as a form, the **Learn About** button will provide a list of lessons available on that item.

If the learner needs help deciding what to do next, the **Job** button provides a list of instructions for completing the job.

If the learner is not sure what help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Refer to Module 1 for more information about these buttons.

Module 2: Forms—Form Lookup

In this scenario, learners look up information on a form. A coworker calls and asks a question concerning a particular problem with an Insurance Claim Form. Learners must locate the correct information on the form based on the question asked and inform the coworker. Here are the objectives of this scenario:

Main objective:

The learner will select the appropriate information requested by the caller by using the Insurance Claim Form as reference material.

Secondary objectives:

- The learner will ask the caller for information needed.
- The learner will select the correct Insurance Claim Form based on information from the caller.
- The learner will complete the call in a timely manner.

These are the basic skills presented in this scenario:

Reading Skills

Read and interpret specific information from written materials.
Read and interpret forms.

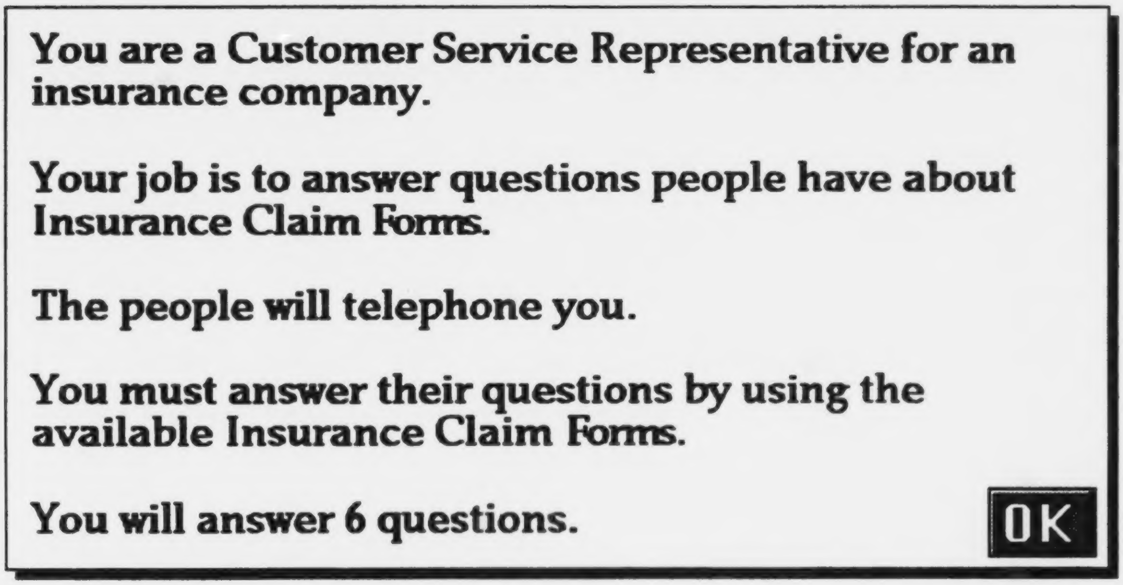
Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

This scenario has the following instructional units:

The Insurance Claim Form:
    What is a Form?

When the learners enter the scenario, they see this:



You are a Customer Service Representative for an insurance company.

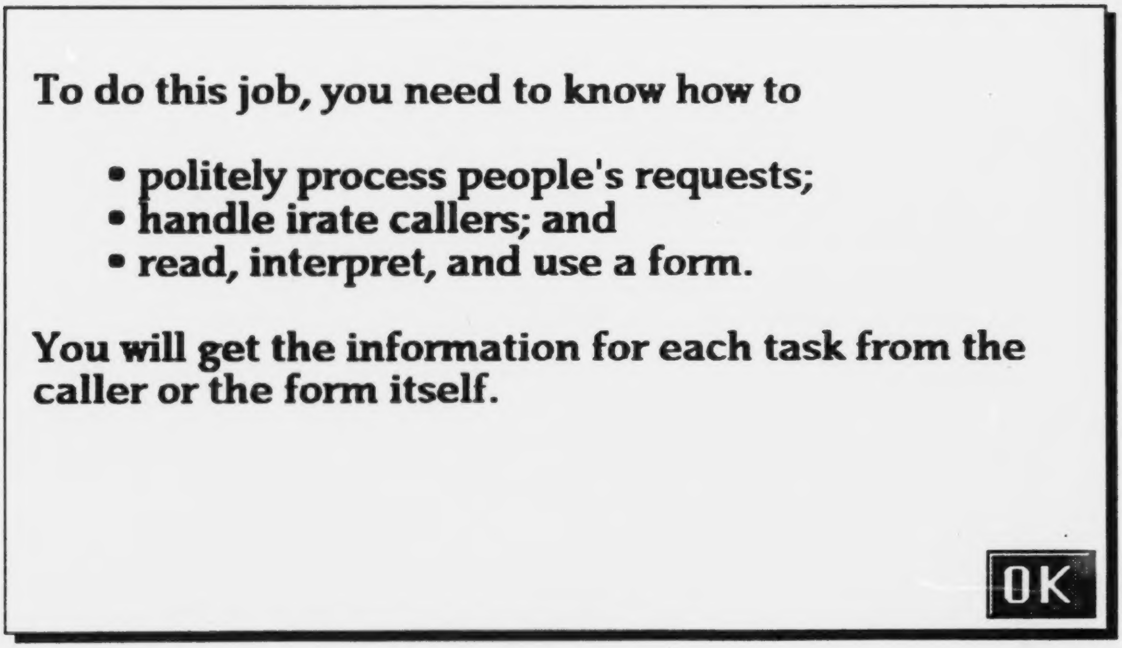
Your job is to answer questions people have about Insurance Claim Forms.

The people will telephone you.

You must answer their questions by using the available Insurance Claim Forms.

You will answer 6 questions.

Then they are told the types of skills they will need to complete the scenario.

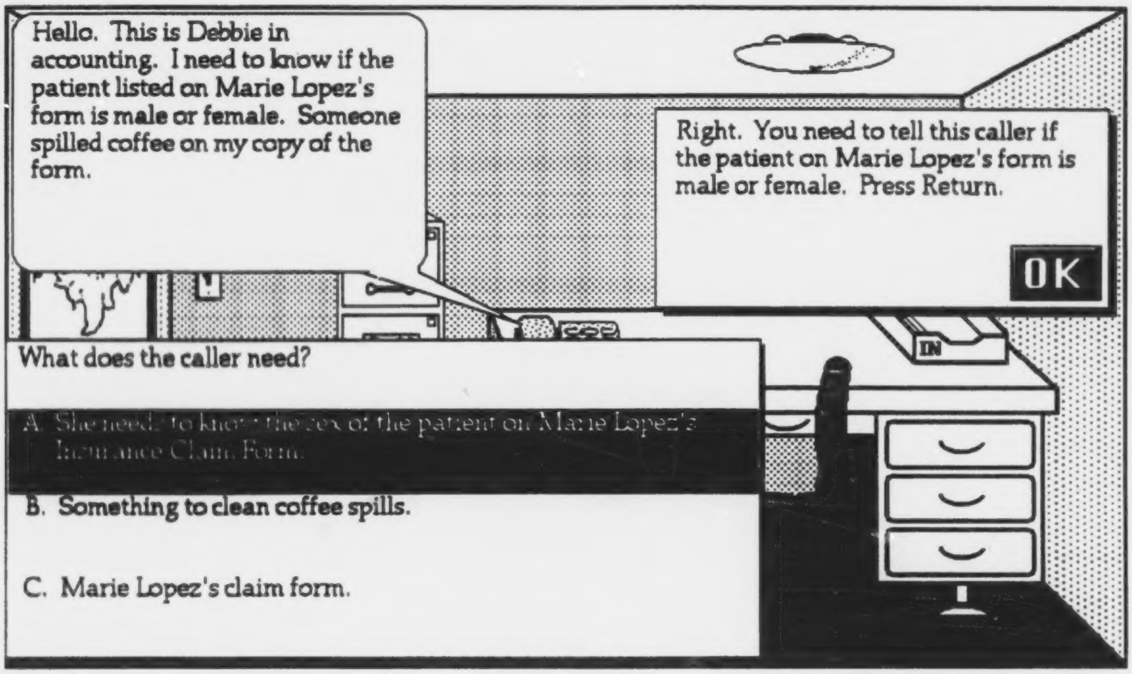


To do this job, you need to know how to

- **politely process people's requests;**
- **handle irate callers; and**
- **read, interpret, and use a form.**

You will get the information for each task from the caller or the form itself.

At this point, the telephone will ring and a coworker will ask a question. The learners will be asked some questions to insure understanding of the problem. The learners will need to locate the correct form in the In Box and look up the requested information. The learners will complete six requests for information.



Hello. This is Debbie in accounting. I need to know if the patient listed on Marie Lopez's form is male or female. Someone spilled coffee on my copy of the form.

Right. You need to tell this caller if the patient on Marie Lopez's form is male or female. Press Return.

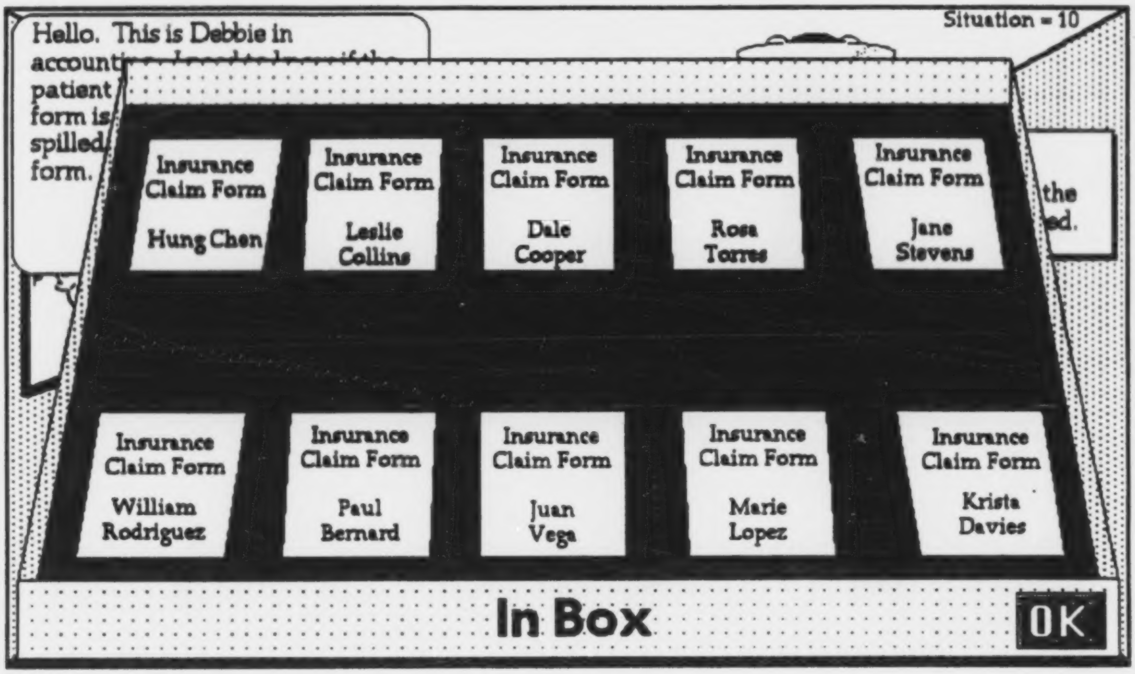
What does the caller need?

A. She needs to know the sex of the patient on Marie Lopez's Insurance Claim Form.

B. Something to clean coffee spills.

C. Marie Lopez's claim form.

To locate the correct Insurance Claim Form, the learners must click on the **Look At** button and then on the In Box.

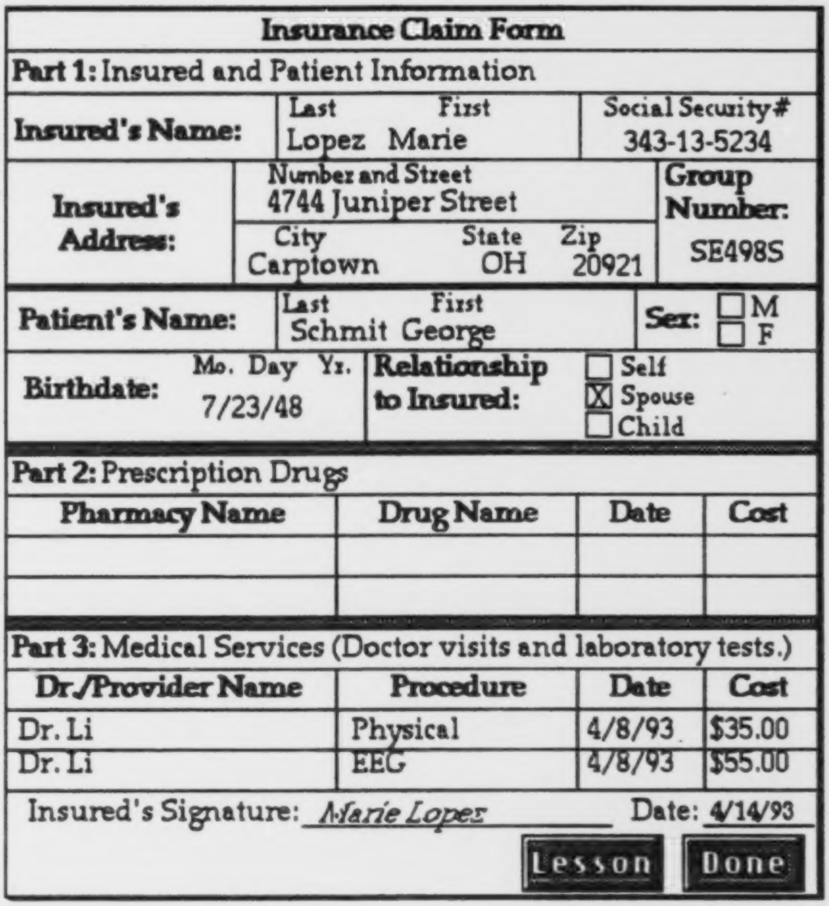


Hello. This is Debbie in
accounti
patient
form is
spilled
form.

the
ed.

Situation = 10
Insurance Claim Form Hung Chen
Insurance Claim Form Leslie Collins
Insurance Claim Form Dale Cooper
Insurance Claim Form Rosa Torres
Insurance Claim Form Jane Stevens
Insurance Claim Form William Rodriguez
Insurance Claim Form Paul Bernard
Insurance Claim Form Juan Vega
Insurance Claim Form Marie Lopez
Insurance Claim Form Krista Davies
In Box
OK

Now the learners must select the correct form by clicking on the **Look At** button and then on the desired form.



Insurance Claim Form

Part 1: Insured and Patient Information

Insured's Name: Last: Lopez First: Marie

Social Security#: 343-13-5234

Insured's Address: Number and Street: 4744 Juniper Street

City: Carptown State: OH Zip: 20921

Group Number: SE498S

Patient's Name: Last: Schmit First: George

Sex: ☐ M ☐ F

Birthdate: Mo. Day Yr. 7/23/48

Relationship to Insured: ☐ Self ☒ Spouse ☐ Child

Part 2: Prescription Drugs

Pharmacy Name	Drug Name	Date	Cost

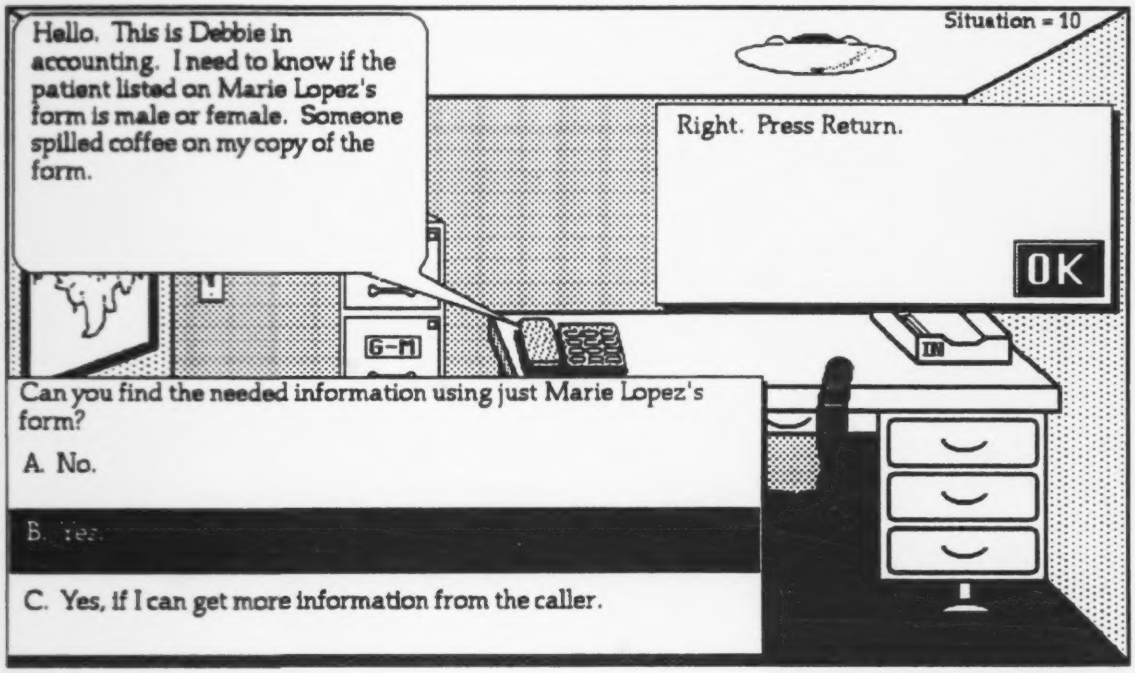
Part 3: Medical Services (Doctor visits and laboratory tests.)

Dr./Provider Name	Procedure	Date	Cost
Dr. Li	Physical	4/8/93	$35.00
Dr. Li	EEG	4/8/93	$55.00

Insured's Signature: *Marie Lopez* Date: 4/14/93

After reading the information on the form, the learners can either request a lesson on the form or go on. To go on, the learners click on the **Done** button, then on the **OK** button in the In Box.

At this point the learners need to decide if more information is needed to complete the call.



Situation = 10

Hello. This is Debbie in accounting. I need to know if the patient listed on Marie Lopez's form is male or female. Someone spilled coffee on my copy of the form.

Right. Press Return.

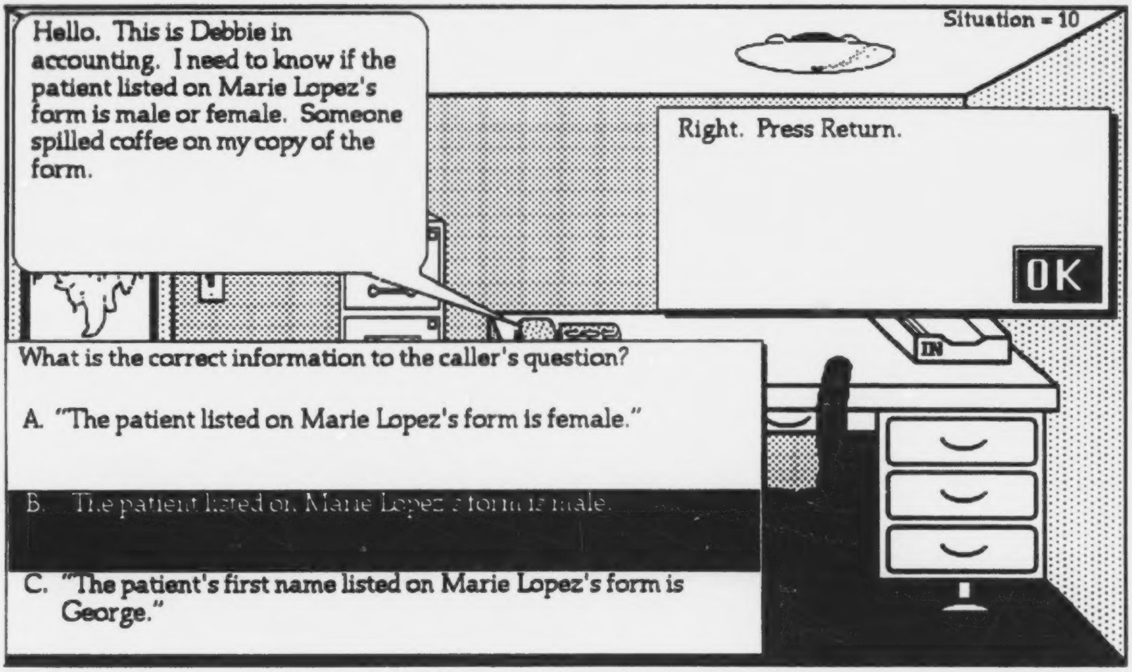
Can you find the needed information using just Marie Lopez's form?

A. No.

B. Yes.

C. Yes, if I can get more information from the caller.

If the learners decide that enough information has been given, a question about the solution is presented.



Hello. This is Debbie in accounting. I need to know if the patient listed on Marie Lopez's form is male or female. Someone spilled coffee on my copy of the form.

Right. Press Return.

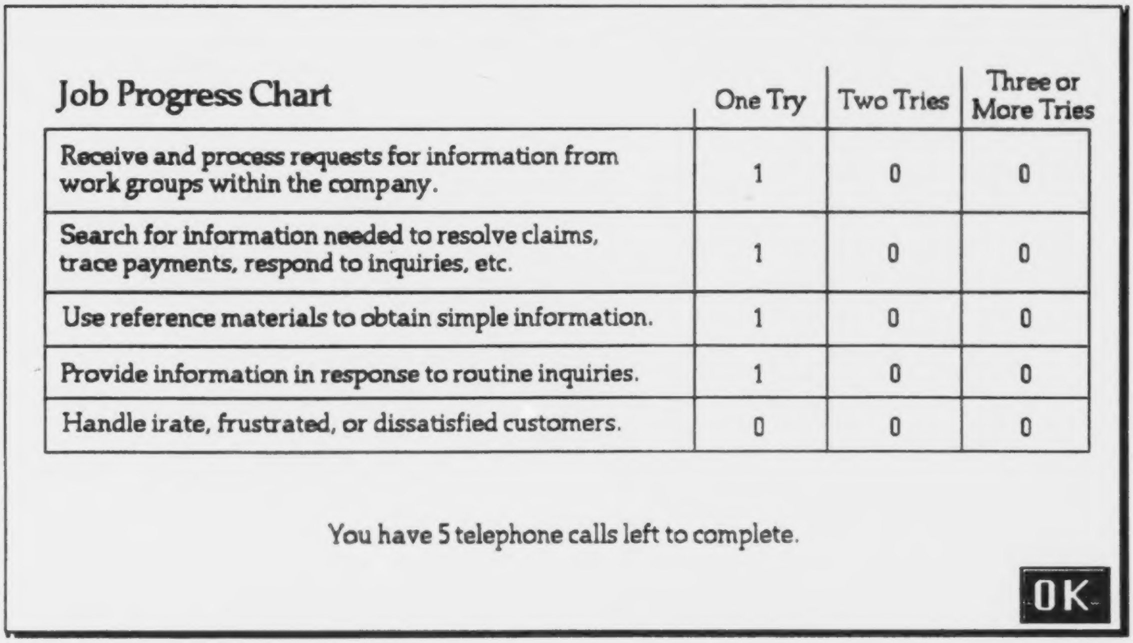
What is the correct information to the caller's question?

A. "The patient listed on Marie Lopez's form is female."

B. The patient listed on Marie Lopez's form is male.

C. "The patient's first name listed on Marie Lopez's form is George."

After answering several questions, the learners receive a Job Progress Chart.



Job Progress Chart

	One Try	Two Tries	Three or More Tries
Receive and process requests for information from work groups within the company.	1	0	0
Search for information needed to resolve claims, trace payments, respond to inquiries, etc.	1	0	0
Use reference materials to obtain simple information.	1	0	0
Provide information in response to routine inquiries.	1	0	0
Handle irate, frustrated, or dissatisfied customers.	0	0	0

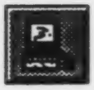
You have 5 telephone calls left to complete.

After clicking **OK**, the learners will receive another call until six calls are completed. A learner's cumulative progress is recorded each time a call is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.



If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 2: Charts—Chart Lookup

In this scenario, learners look up information on a chart. A customer either calls or walks in and asks a question concerning interest rates on various banking services. The learners must locate the correct information on the chart based on the question asked. Here are the objectives of this scenario:

Main objective:

The learner will select the appropriate information requested by the customer by using the Interest Rate Chart as reference material.

Secondary objectives:

- The learner will ask the customer for information needed.
- The learner will make decisions about what information to give to the customer based on the Interest Rate Chart.
- The learner will complete the inquiry in a timely manner.

These are the basic skills presented in this scenario:

Reading Skills

Read and interpret specific information from written materials.
Read and interpret charts, graphs, tables, and forms.

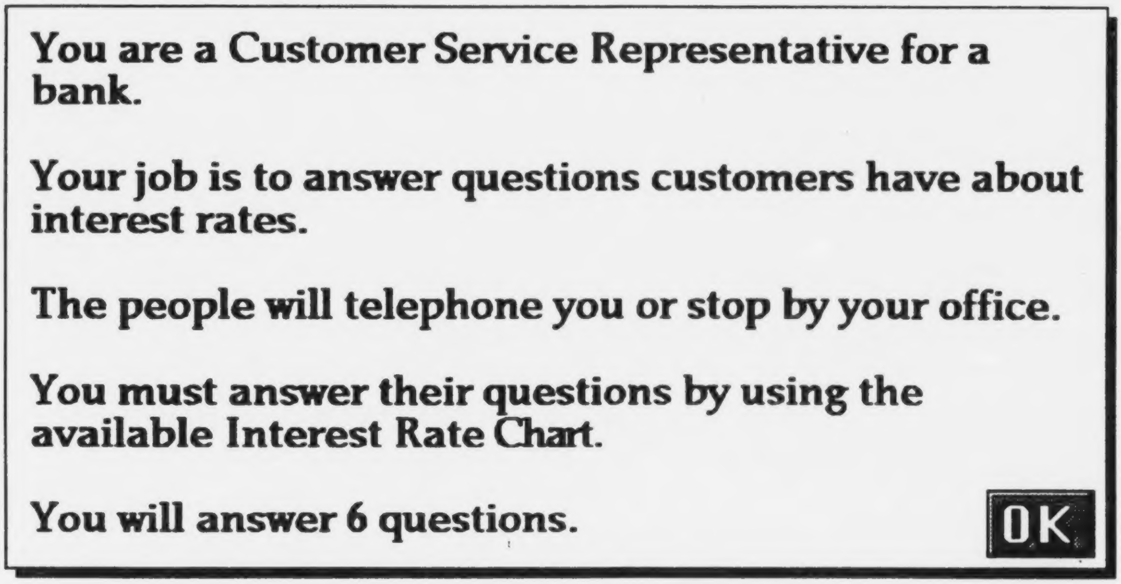
Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

This scenario has the following instructional units:

The Interest Rate Chart:
    What is a Chart?
    How to Look Up Chart Information.

When the learners enter the scenario, they see this:



You are a Customer Service Representative for a bank.

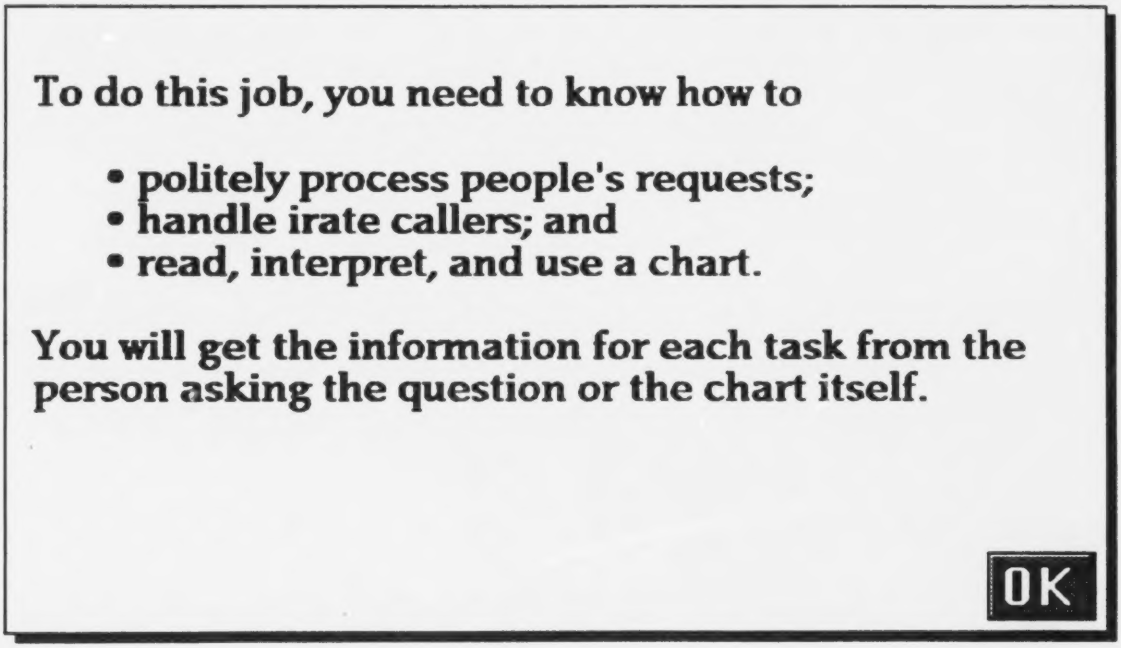
Your job is to answer questions customers have about interest rates.

The people will telephone you or stop by your office.

You must answer their questions by using the available Interest Rate Chart.

You will answer 6 questions.

Then they are told the types of skills they will need to complete the scenario.

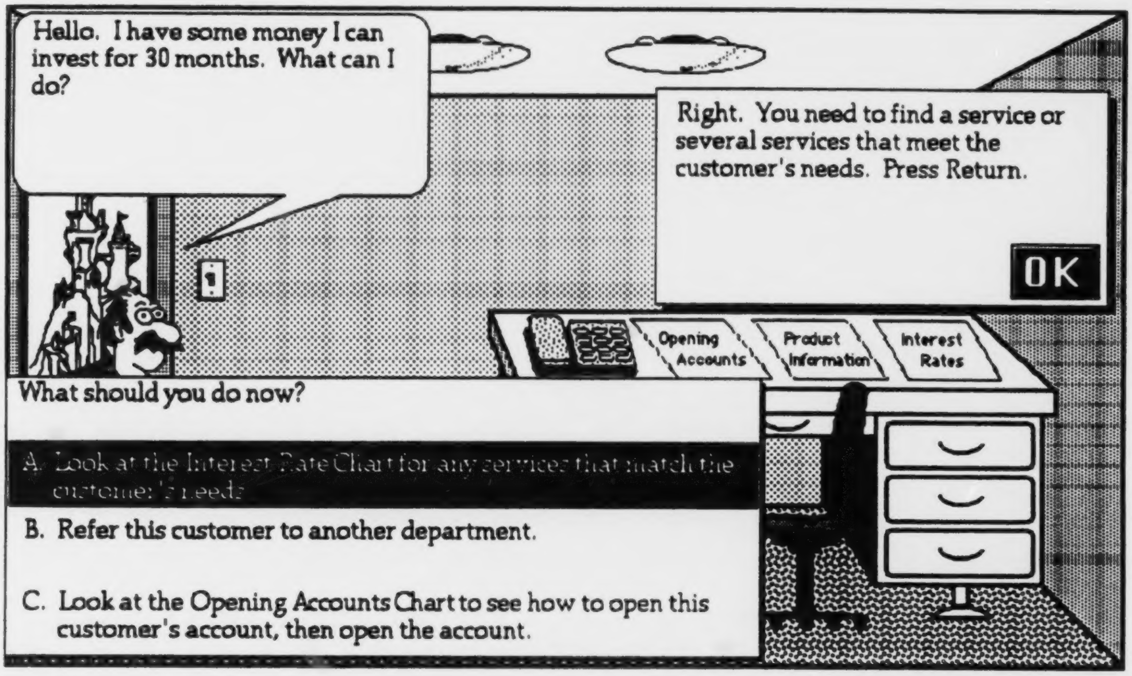


To do this job, you need to know how to

- politely process people's requests;
- handle irate callers; and
- read, interpret, and use a chart.

You will get the information for each task from the person asking the question or the chart itself.

At this point, either a telephone will ring or a customer will appear and ask a question. The learners will be asked questions that will help determine how to solve the problem. The learners will need to locate the correct chart and look up the requested information. The learners will complete six requests for information.



Hello. I have some money I can invest for 30 months. What can I do?

Right. You need to find a service or several services that meet the customer's needs. Press Return.

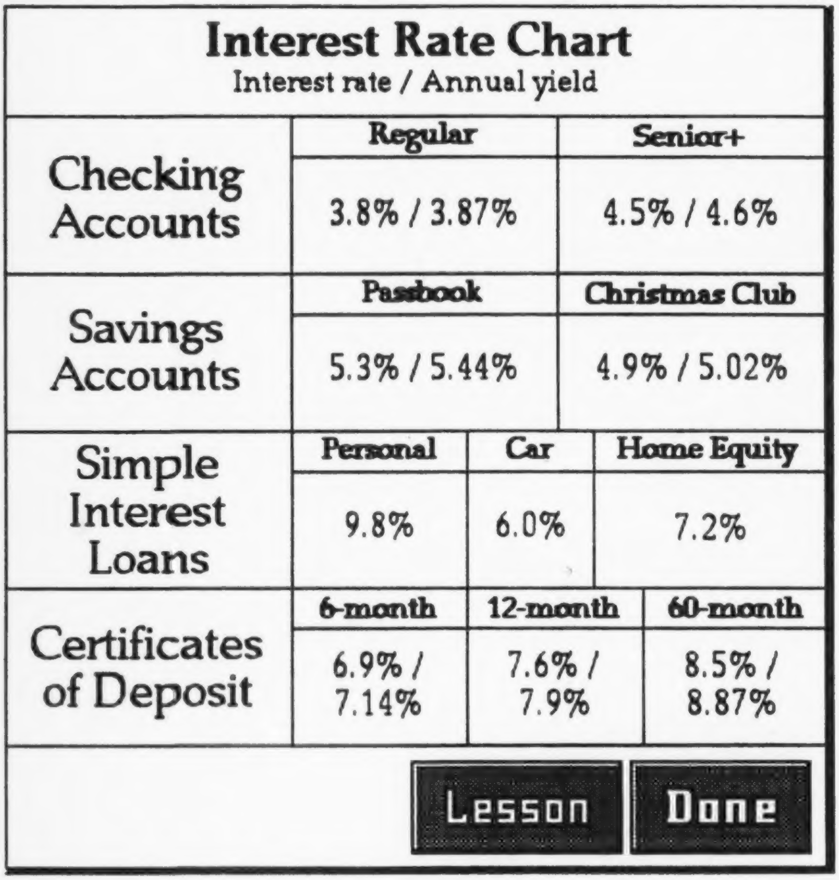
What should you do now?

A. Look at the Interest Rate Chart for any services that match the customer's needs

B. Refer this customer to another department.

C. Look at the Opening Accounts Chart to see how to open this customer's account, then open the account.

To look at the correct chart, the learners click on the **Look At** button and then on the desired chart.

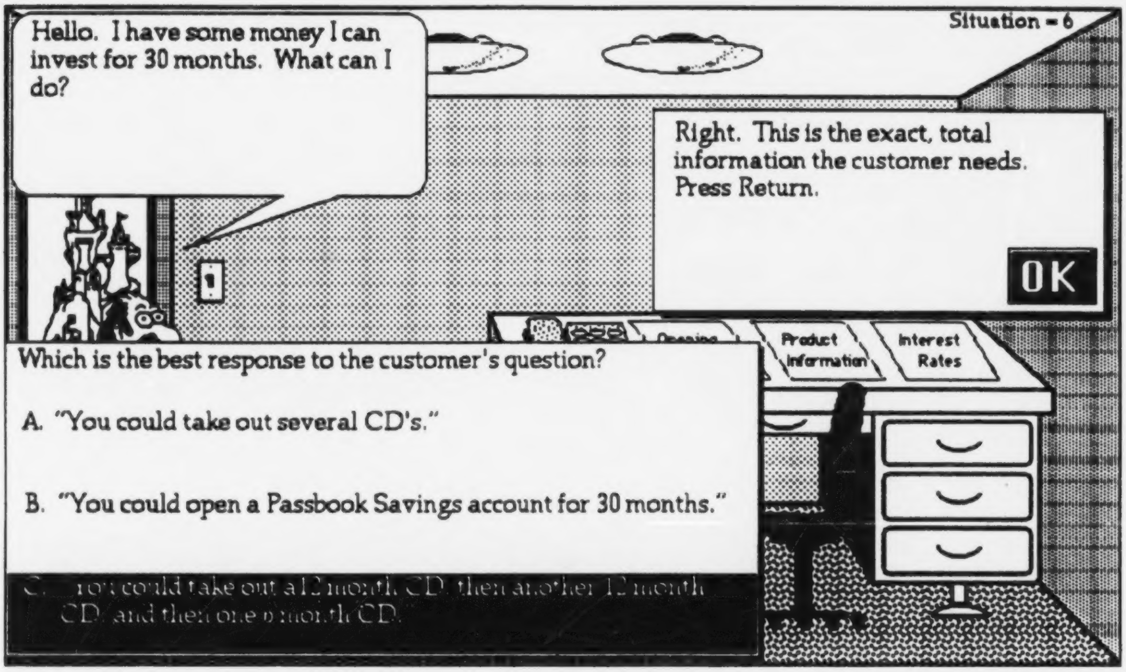


Interest Rate Chart

Interest rate / Annual yield

Checking Accounts	**Regular**	**Senior+**	
	3.8% / 3.87%	4.5% / 4.6%	
Savings Accounts	**Passbook**	**Christmas Club**	
	5.3% / 5.44%	4.9% / 5.02%	
Simple Interest Loans	**Personal**	**Car**	**Home Equity**
	9.8%	6.0%	7.2%
Certificates of Deposit	**6-month**	**12-month**	**60-month**
	6.9% / 7.14%	7.6% / 7.9%	8.5% / 8.87%

After reading the information on the chart, the learners can either request a lesson on the chart or go on to answer the next question. To go on, the learners click on the **Done** button.



Hello. I have some money I can invest for 30 months. What can I do?

Right. This is the exact, total information the customer needs. Press Return.

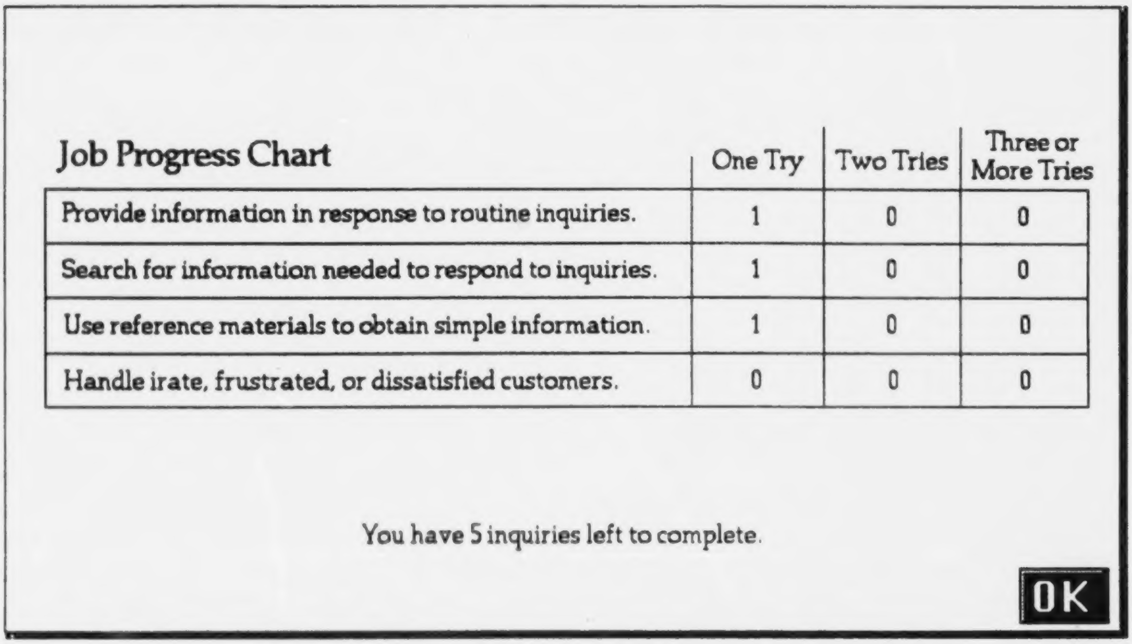
Which is the best response to the customer's question?

A. "You could take out several CD's."

B. "You could open a Passbook Savings account for 30 months."

C. You could take out a 12 month CD, then another 12 month CD, and then one 6 month CD.

A question about the solution is presented. After answering the question, the learners receive a Job Progress Chart.



Job Progress Chart	One Try	Two Tries	Three or More Tries
Provide information in response to routine inquiries.	1	0	0
Search for information needed to respond to inquiries.	1	0	0
Use reference materials to obtain simple information.	1	0	0
Handle irate, frustrated, or dissatisfied customers.	0	0	0

You have 5 inquiries left to complete.

After clicking **OK**, the learners will receive another call until six calls are completed. The learner's cumulative progress is recorded each time a call is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.

If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 2: Manuals—Procedure Lookup

In this scenario, learners look up information in a manual. A customer calls and asks a question concerning a particular problem with a credit card bill. The learners must locate the correct information in the manual based on the question asked and inform the customer of the solution. Here are the objectives of this scenario:

Main objective:

The learner will take the appropriate action based on information requested by the customer and obtained from the customer and the Customer Service Manual.

Secondary objectives:

- The learner will ask the customer for information needed.
- The learner will complete the Problem Inquiry Form with information obtained from the customer.
- The learner will make decisions about how to solve the customer's problem based on information from the Customer Service Manual.
- The learner will complete the call in a timely manner.
- The learner will correctly handle irate or dissatisfied customers.

These are the basic skills presented in this scenario:

Reading Skills

Use reference materials in manuals.
Read and interpret sequential directions in manuals.
Use table of contents, index, and appendices in manuals.
Read and interpret forms.

Writing Skills

Record date, time, and other requested information on work forms.
Write information in a clear, logical, and complete manner.

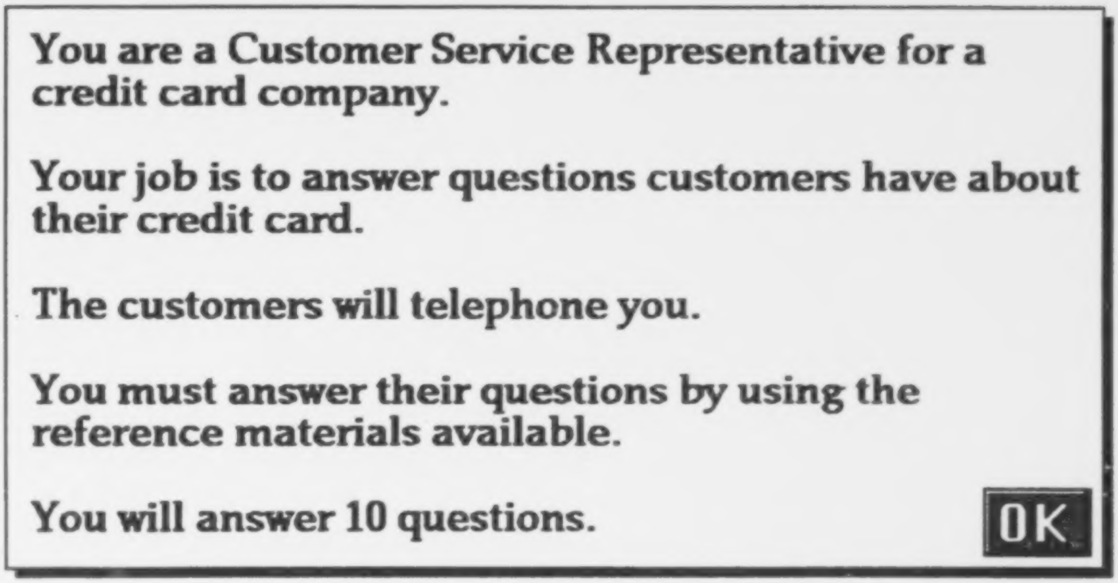
Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

This scenario has the following instructional units:

The Customer Service Manual:
    What is a Manual?
    How to Use a Table of Contents.
    How to Use an Index.
    How to Use Headings.
The Problem Inquiry Form:
    What is a Form?

When learners enter the scenario, they see this:



You are a Customer Service Representative for a credit card company.

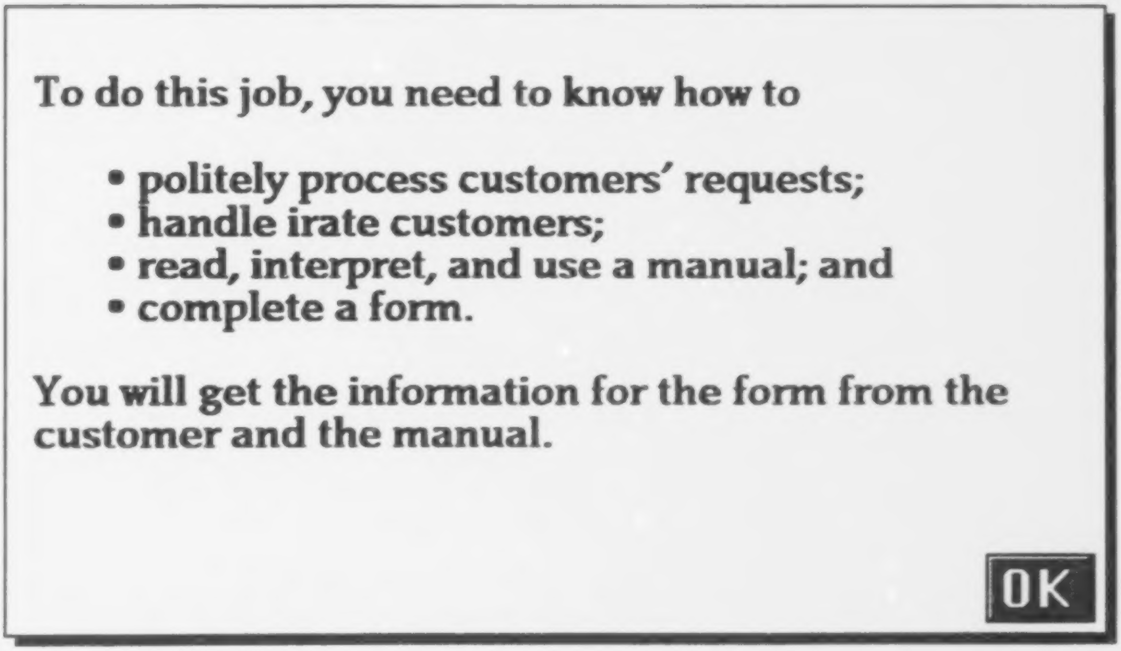
Your job is to answer questions customers have about their credit card.

The customers will telephone you.

You must answer their questions by using the reference materials available.

You will answer 10 questions.

Then they are told the types of skills they will need to complete the scenario.

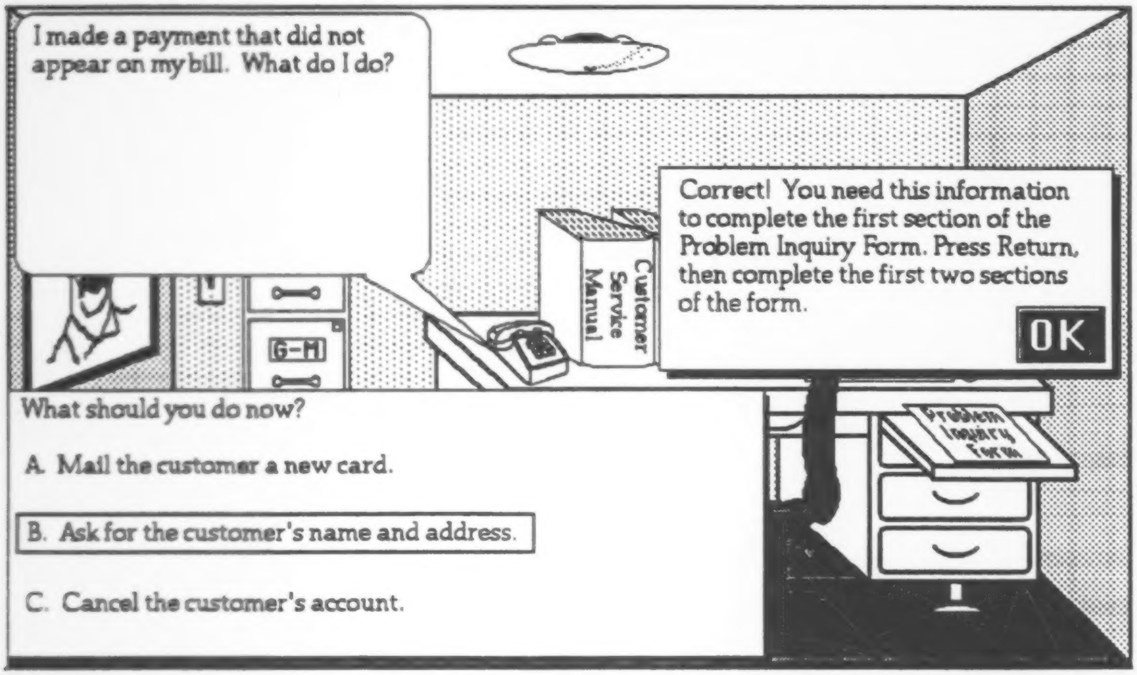


To do this job, you need to know how to

- politely process customers' requests;
- handle irate customers;
- read, interpret, and use a manual; and
- complete a form.

You will get the information for the form from the customer and the manual.

At this point, the telephone will ring and a customer will state the problem. A question will appear and ask the learners what to do next. The learners will need to ask the customer for additional information, complete the Problem Inquiry Form, and use the manual to find the solution to the problem.



I made a payment that did not appear on my bill. What do I do?

Correct! You need this information to complete the first section of the Problem Inquiry Form. Press Return, then complete the first two sections of the form.

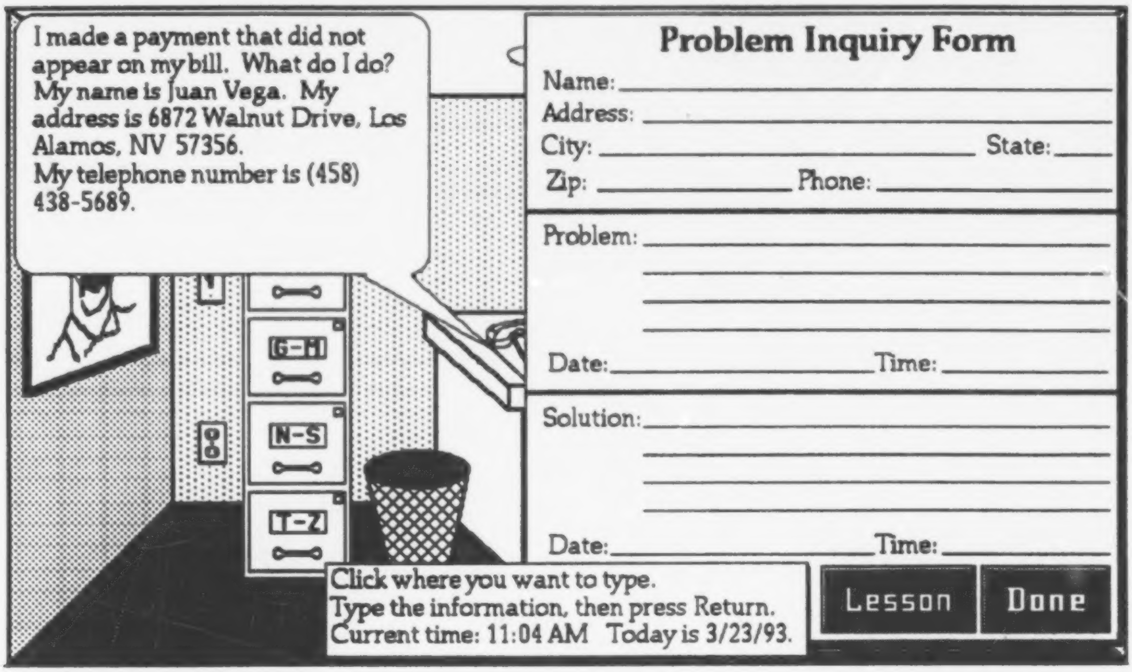
What should you do now?

A. Mail the customer a new card.

B. Ask for the customer's name and address.

C. Cancel the customer's account.

To complete the Problem Inquiry Form, the learners must click on the **Look At** button and then on the Problem Inquiry Form.



I made a payment that did not appear on my bill. What do I do? My name is Juan Vega. My address is 6872 Walnut Drive, Los Alamos, NV 57356.
My telephone number is (458) 438-5689.

Problem Inquiry Form

Name: ________
Address: ________
City: ________ State: ____
Zip: ________ Phone: ________
Problem: ________
Date: ________ Time: ________
Solution: ________
Date: ________ Time: ________

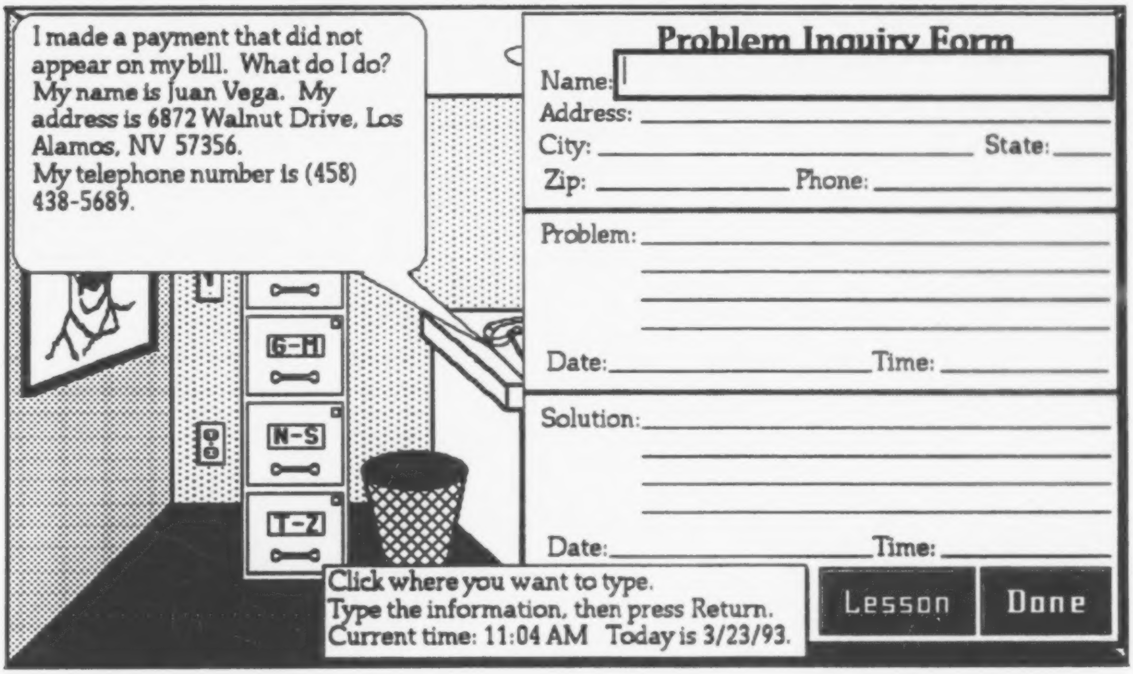
Click where you want to type.
Type the information, then press Return.
Current time: 11:04 AM Today is 3/23/93.

To enter information on this form, learners click on the area in which the information should be entered. A box with a thick black border outlines the area. When the blinking vertical bar cursor appears, learners can type information into that field.

When learners are within a field, the arrow keys or the mouse will move the blinking vertical bar cursor to the desired position. Pressing the Delete or Backspace key will erase the character immediately to the left of the cursor. Pressing Return or Enter tells the computer that learners are finished typing in that area. Learners then can click on the next field they want to change and repeat the process described above.

Learners must click on the **Done** button after they complete all the necessary fields. This tells the computer to evaluate what they typed.

Notice the **Lesson** button on the form. If learners do not know how to use this form, they can click on this button to choose lessons on this particular form or on forms in general.



I made a payment that did not appear on my bill. What do I do? My name is Juan Vega. My address is 6872 Walnut Drive, Los Alamos, NV 57356.
My telephone number is (458) 438-5689.

Problem Inquiry Form

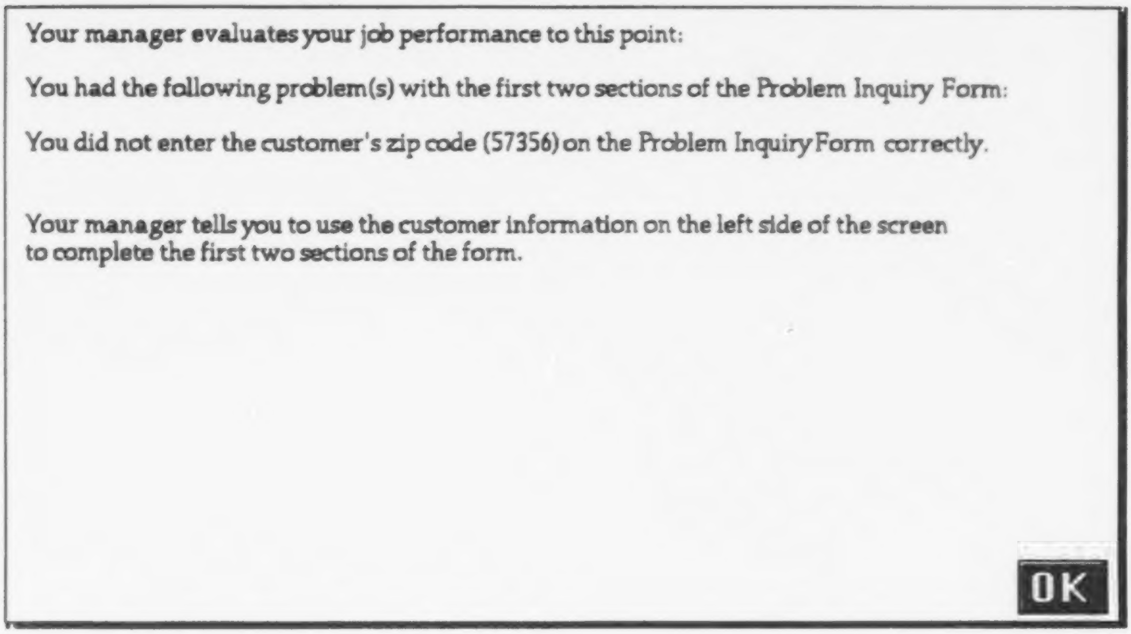
Name:
Address:
City: State:
Zip: Phone:

Problem:
Date: Time:

Solution:
Date: Time:

Click where you want to type.
Type the information, then press Return.
Current time: 11:04 AM Today is 3/23/93.

The learners must complete the first two sections of the form at this point. Instructive feedback is given to the learners when mistakes are made.



Your manager evaluates your job performance to this point:

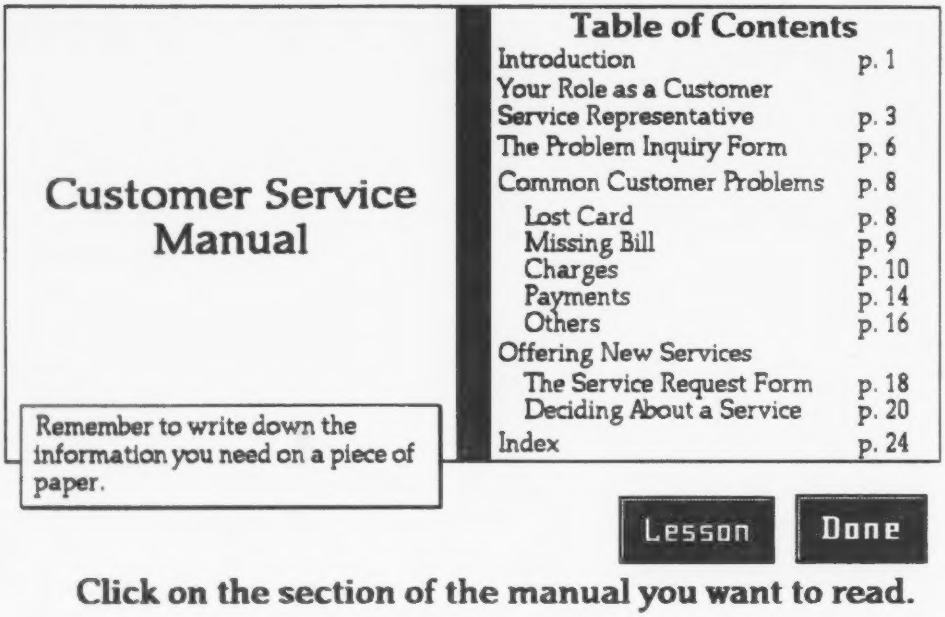
You had the following problem(s) with the first two sections of the Problem Inquiry Form:

You did not enter the customer's zip code (57356) on the Problem Inquiry Form correctly.

Your manager tells you to use the customer information on the left side of the screen to complete the first two sections of the form.

If the learners have problems completing these sections after repeated attempts, the learners are guided to appropriate lessons.

After correctly completing the first two sections of the form, the computer will ask a question about the possible solution to the customer's question. Before choosing a solution, the learners should refer to the Customer Service Manual. To do this, the learners click on the **Look At** button and then on the Customer Service Manual.



Customer Service Manual

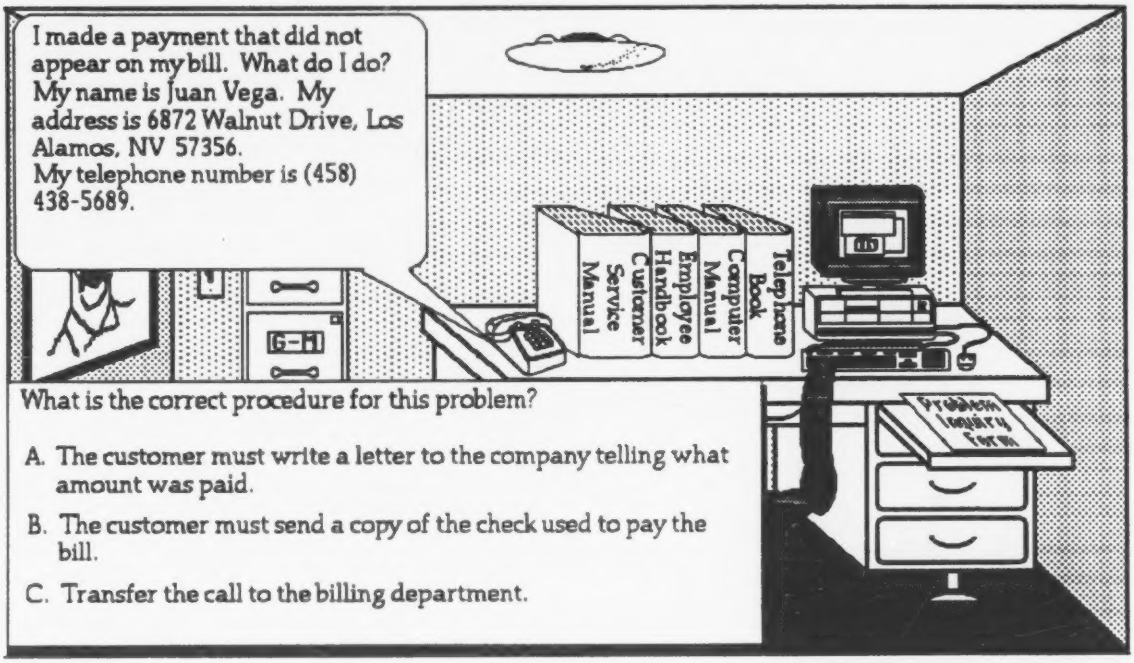
Remember to write down the information you need on a piece of paper.

Table of Contents

Introduction p. 1
Your Role as a Customer Service Representative p. 3
The Problem Inquiry Form p. 6
Common Customer Problems p. 8
  Lost Card p. 8
  Missing Bill p. 9
  Charges p. 10
  Payments p. 14
  Others p. 16
Offering New Services
  The Service Request Form p. 18
  Deciding About a Service p. 20
Index p. 24

Click on the section of the manual you want to read.

At this point, learners need to decide how to find the solution to the problem. They can click on a section of the Table of Contents or go to the Index and select a topic there. The computer will prompt them as necessary. Learners should read the solution to the customer's problem and write it down on a piece of paper. Learners then click on the **Done** button, and the question about the possible solution will be displayed again. Notice the **Lesson** button on the Table of Contents. If learners do not know how to use this Table of Contents, they can click on this button to choose lessons on this Table of Contents or on Table of Contents in general.



I made a payment that did not appear on my bill. What do I do?
My name is Juan Vega. My address is 6872 Walnut Drive, Los Alamos, NV 57356.
My telephone number is (458) 438-5689.

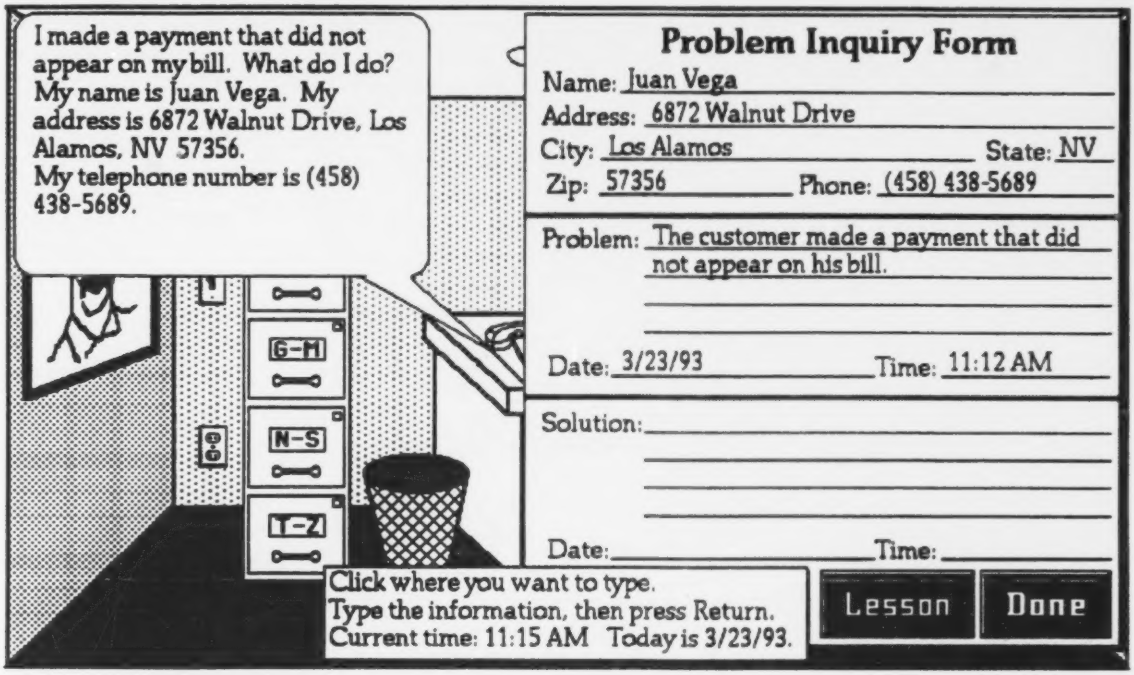
What is the correct procedure for this problem?

A. The customer must write a letter to the company telling what amount was paid.

B. The customer must send a copy of the check used to pay the bill.

C. Transfer the call to the billing department.

After learners select the correct answer, the computer will tell them to complete the last section of the Problem Inquiry Form. To do this, learners must click on the **Look At** button and then on the Problem Inquiry Form.



I made a payment that did not appear on my bill. What do I do? My name is Juan Vega. My address is 6872 Walnut Drive, Los Alamos, NV 57356.
My telephone number is (458) 438-5689.

Problem Inquiry Form

Name: Juan Vega
Address: 6872 Walnut Drive
City: Los Alamos State: NV
Zip: 57356 Phone: (458) 438-5689

Problem: The customer made a payment that did not appear on his bill.

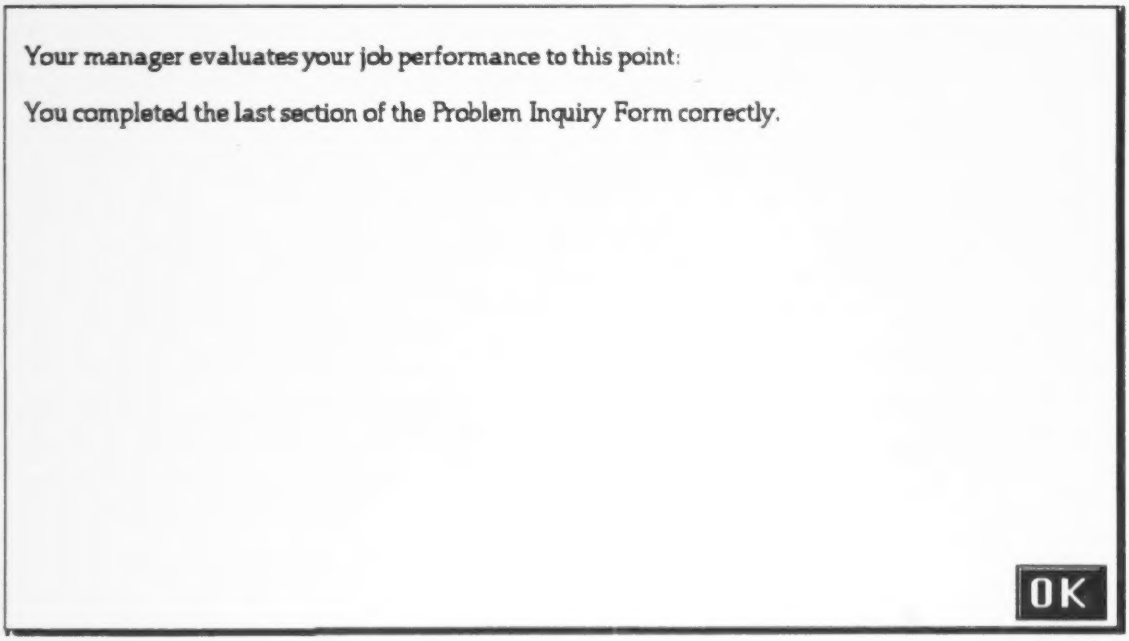
Date: 3/23/93 Time: 11:12 AM

Solution:

Date: Time:

Click where you want to type.
Type the information, then press Return.
Current time: 11:15 AM Today is 3/23/93.

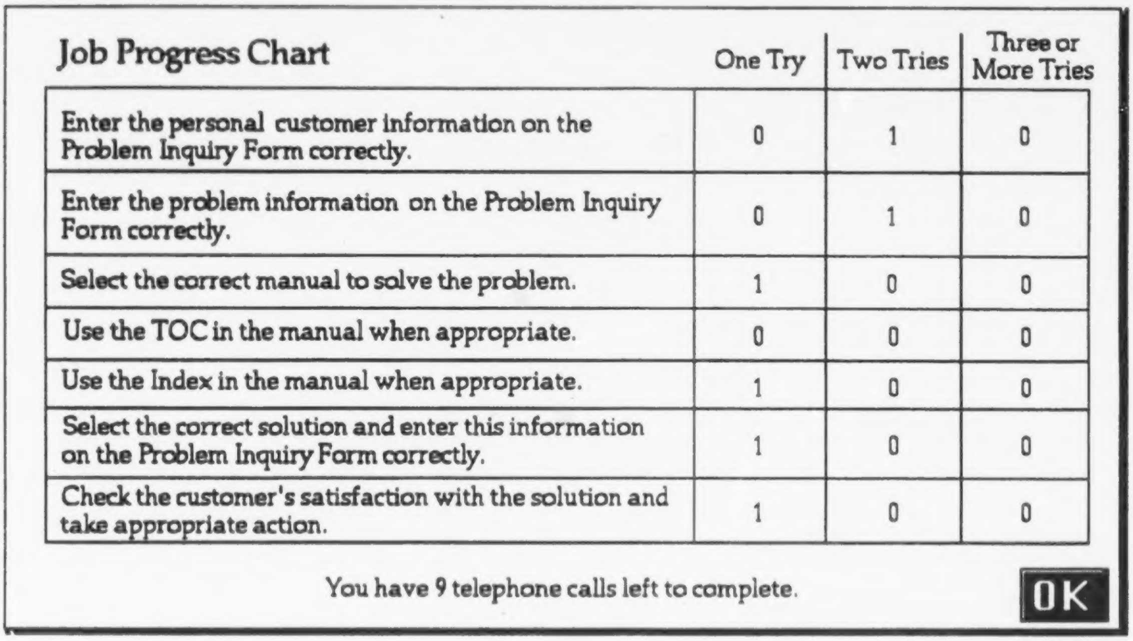
Learners complete the second half of the form the same way as the first. If learners have problems completing this section after repeated attempts, they are guided into appropriate lessons. After clicking on the **Done** button, learners receive feedback on their performance.



Your manager evaluates your job performance to this point:

You completed the last section of the Problem Inquiry Form correctly.

Learners are then asked some more questions about completing the call. Then learners receive a Job Progress Chart.



Job Progress Chart	One Try	Two Tries	Three or More Tries
Enter the personal customer information on the Problem Inquiry Form correctly.	0	1	0
Enter the problem information on the Problem Inquiry Form correctly.	0	1	0
Select the correct manual to solve the problem.	1	0	0
Use the TOC in the manual when appropriate.	0	0	0
Use the Index in the manual when appropriate.	1	0	0
Select the correct solution and enter this information on the Problem Inquiry Form correctly.	1	0	0
Check the customer's satisfaction with the solution and take appropriate action.	1	0	0

You have 9 telephone calls left to complete.

After clicking **OK**, learners will receive another call until ten calls are completed. A learner's cumulative progress is recorded each time a call is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.

If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 2: Computers—Telephone Number Lookup

In this scenario, learners look up a telephone number using a computer system. A customer calls them and asks for a telephone number for a particular person. Learners must locate the correct number by using a computer database. Here are the objectives of this scenario:

Main objective:

The learner will take the appropriate action based on a request from the customer. The learner will use information obtained from the customer and the computer to satisfy the request.

Secondary objectives:

- The learner will log on and log off the computer.
- The learner will ask the customer for information needed.
- The learner will complete a database search on the computer using information obtained from the customer.
- The learner will make decisions about what information is needed based on the computer screen information.
- The learner will use the appropriate F-keys based on the computer screen instructions.
- The learner will complete the call in a timely manner.

These are the basic skills presented in this scenario:

Reading Skills

Read and interpret sequential directions in textbooks, manuals, and handouts.
Read and interpret basic instructions in operating equipment.
Read directions and interpret basic computer materials, e.g., printouts, software programs, etc.

Writing Skills

Record date, time, and other requested information on work forms.

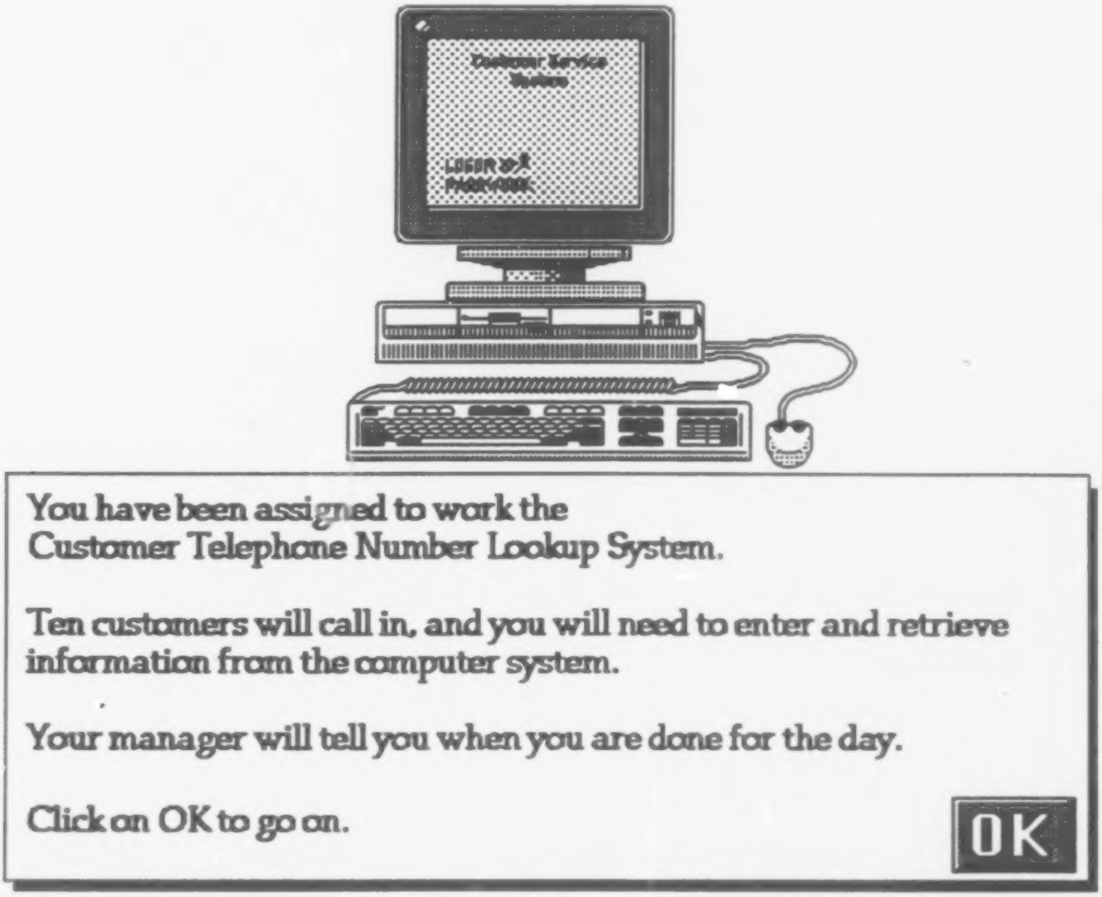
Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

This scenario includes the following instructional units:

- The Computer Operations Job Aid:
  - What is a Job Aid?
- The Logon Screen:
  - What are Computer Screen Fields?
  - What are Computer Messages?
  - How to Ask for Help.
- The Customer Service Selection Menu:
  - What are Computer Screen Fields?
  - What are Computer Messages?
  - How to Ask for Help.
- The Telephone Number Inquiry Screen:
  - What are Computer Screen Fields?
  - What are Function Keys?
  - What are Computer Messages?

As soon as learners enter the scenario, they see this:



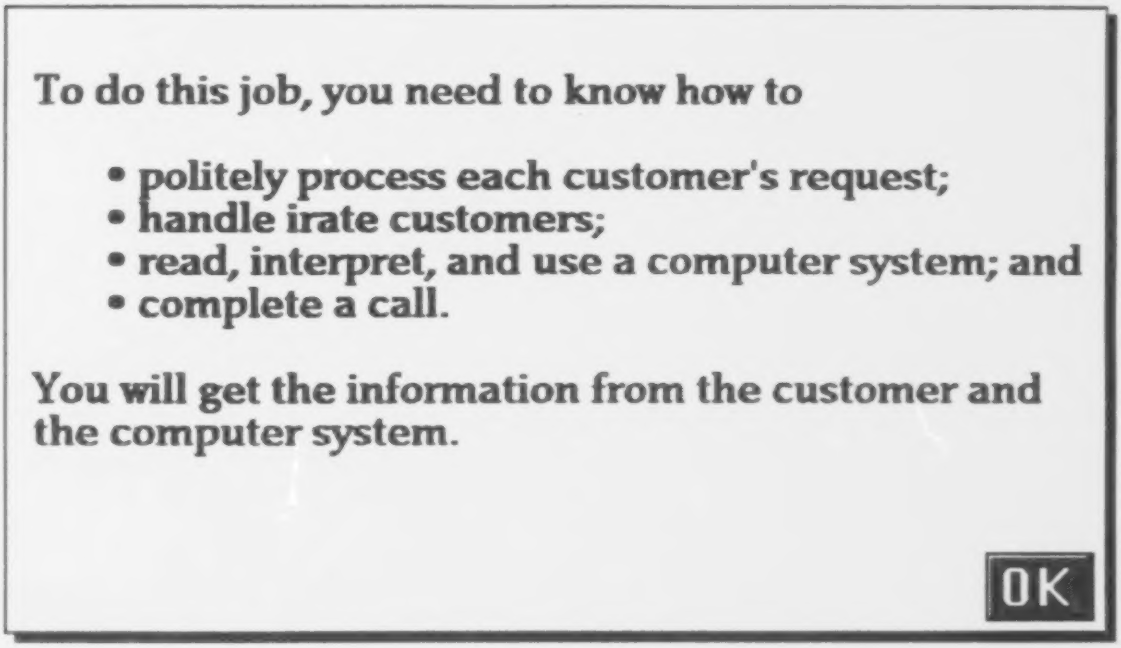
You have been assigned to work the
Customer Telephone Number Lookup System.

Ten customers will call in, and you will need to enter and retrieve information from the computer system.

Your manager will tell you when you are done for the day.

Click on OK to go on.

Then they are told the types of skills they will need to complete the scenario.

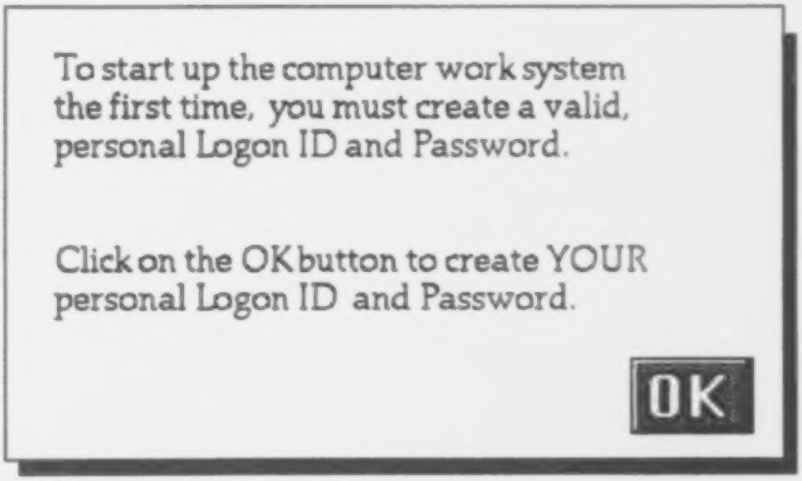


To do this job, you need to know how to

- **politely process each customer's request;**
- **handle irate customers;**
- **read, interpret, and use a computer system; and**
- **complete a call.**

You will get the information from the customer and the computer system.

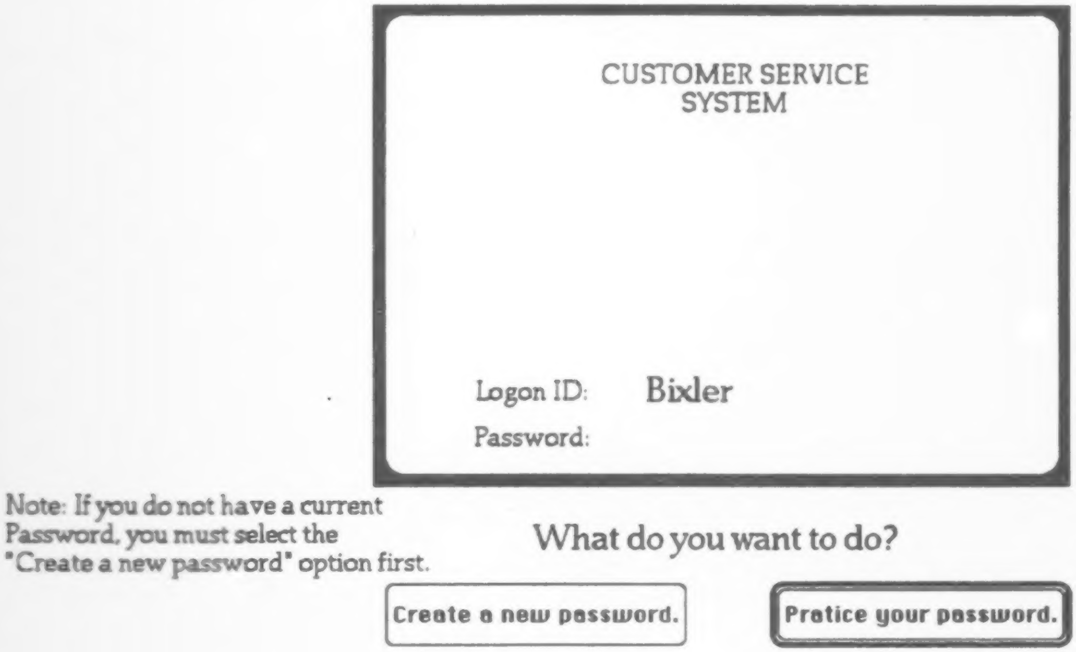
After the learners click **OK**, and if it is their first time through the system, they are told they must create a Logon ID and password.



To start up the computer work system the first time, you must create a valid, personal Logon ID and Password.

Click on the OK button to create YOUR personal Logon ID and Password.

After the learners click **OK,** they are taken to the lesson about the Logon Screen. Here they learn about Logon IDs and passwords. They are asked to enter their last name as a Logon ID. Then they are asked to make up a password that begins with two letters and ends with three numbers.



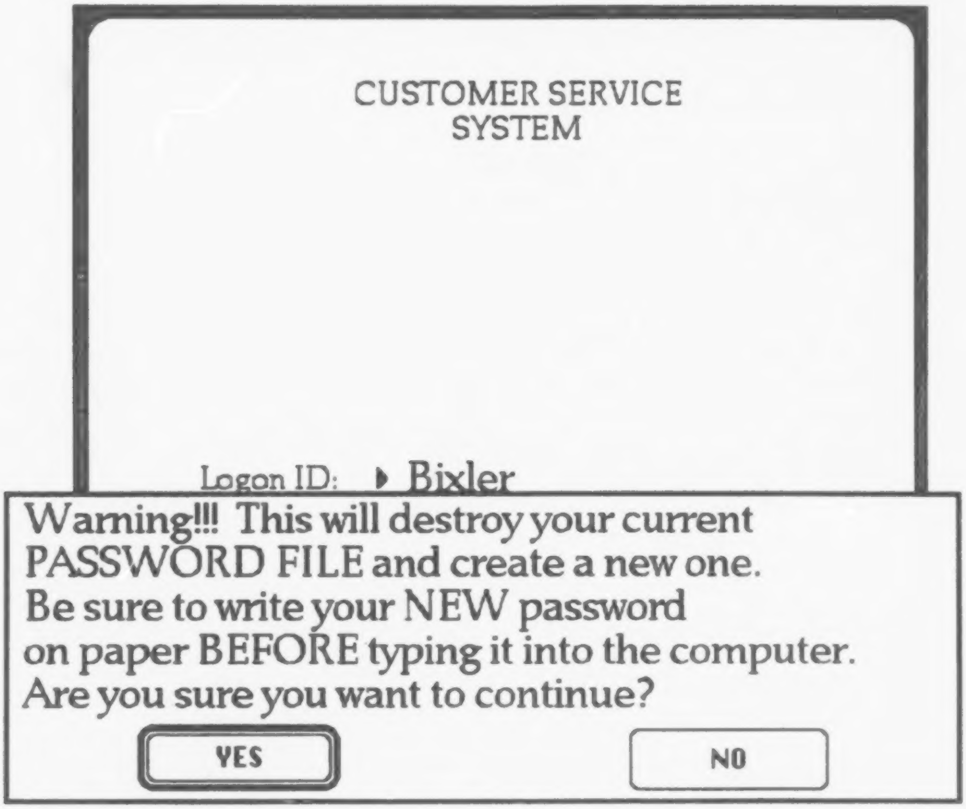
CUSTOMER SERVICE
SYSTEM

Logon ID: Bixler
Password:

Note: If you do not have a current Password, you must select the "Create a new password" option first.

What do you want to do?

After they click on the **Create a New Password** button, they are given a warning.



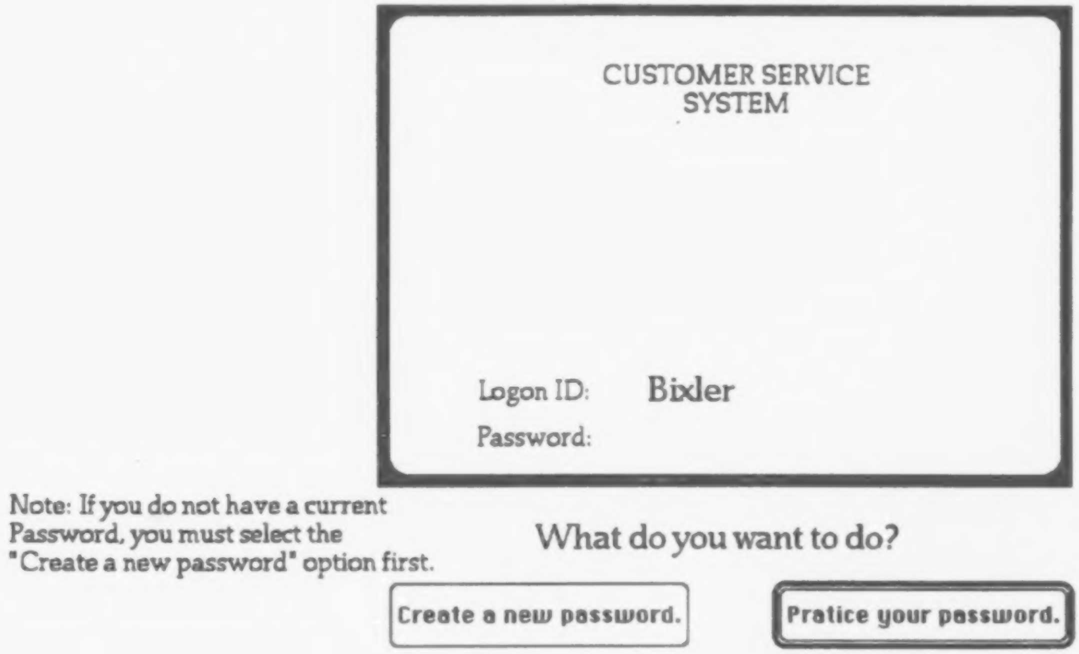
CUSTOMER SERVICE
SYSTEM

Logon ID: ▸ Bixler

Warning!!! This will destroy your current
PASSWORD FILE and create a new one.
Be sure to write your NEW password
on paper BEFORE typing it into the computer.
Are you sure you want to continue?

They should click on **Yes** to create their password. First they are asked to enter two letters and then they are asked to enter three numbers. These letters and numbers become their password. An example password is "XX123."

After creating a password, learners are given an opportunity to practice entering the Logon ID and password.



CUSTOMER SERVICE
SYSTEM

Logon ID: Bixler
Password:

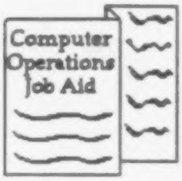
Note: If you do not have a current Password, you must select the "Create a new password" option first.

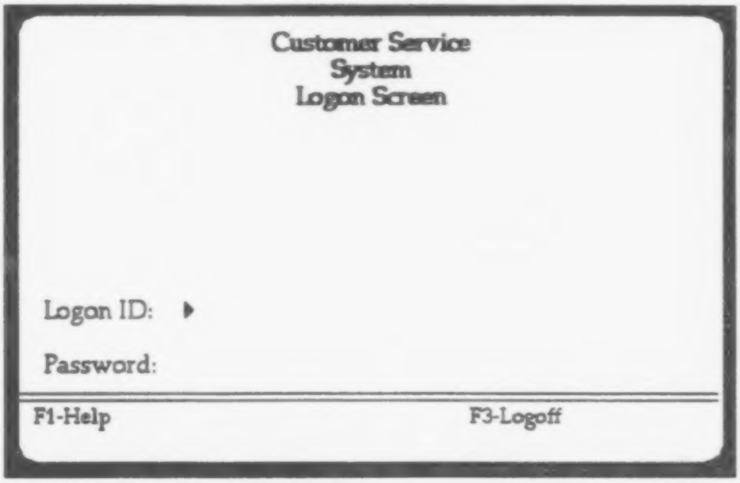
What do you want to do?

The learners should click on the **Practice Your Password** button. Then they enter their password on the Logon Screen.

If learners have already created a password they are reminded of it.

After creating a password, or seeing the old password, learners are prompted to complete the Logon Screen. They first enter the Logon ID and press Enter. Then they enter the password and press Enter.


Computer
Operations
Job Aid


Customer Service
System
Logon Screen

Logon ID: ▸

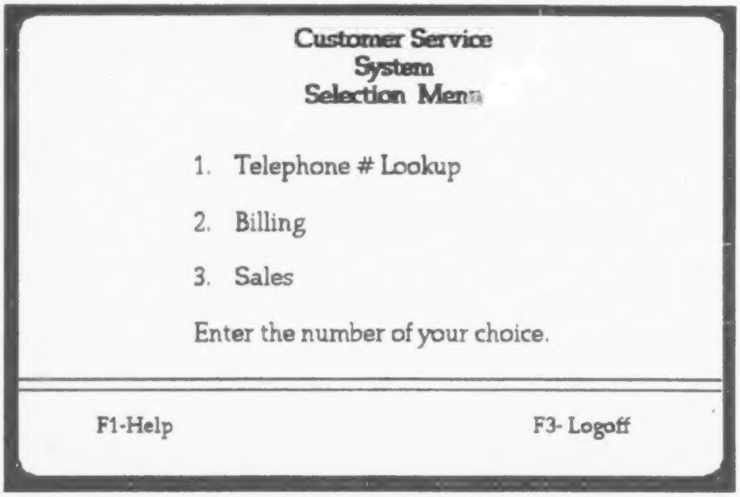
Password:

F1-Help
F3-Logoff

Enter your Logon ID now.
Type in your Logon ID, and press Enter.

After learners have logged onto the computer, they are then taken to the Customer Service System Selection Menu. For this scenario, they should select option 1, Telephone # Lookup. If learners try to select other menu choices, the computer tells them they need to choose option 1.

Computer
Operations
Job Aid



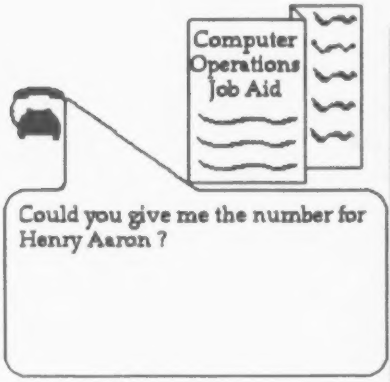
**Customer Service
System
Selection Menu**

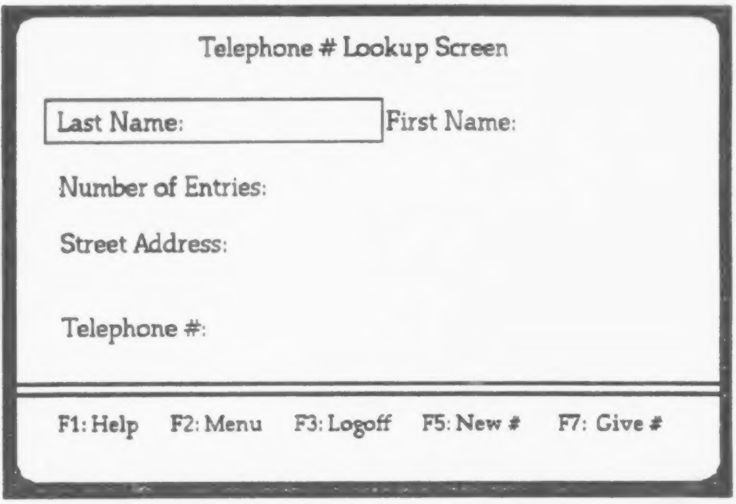
1. Telephone # Lookup
2. Billing
3. Sales

Enter the number of your choice.

F1-Help F3- Logoff

At this point, the telephone will ring and a customer will request a telephone number. The learners complete the Telephone # Lookup Screen based on the customer's request.


Computer Operations Job Aid
Could you give me the number for Henry Aaron ?



Telephone # Lookup Screen

Last Name: First Name:

Number of Entries:

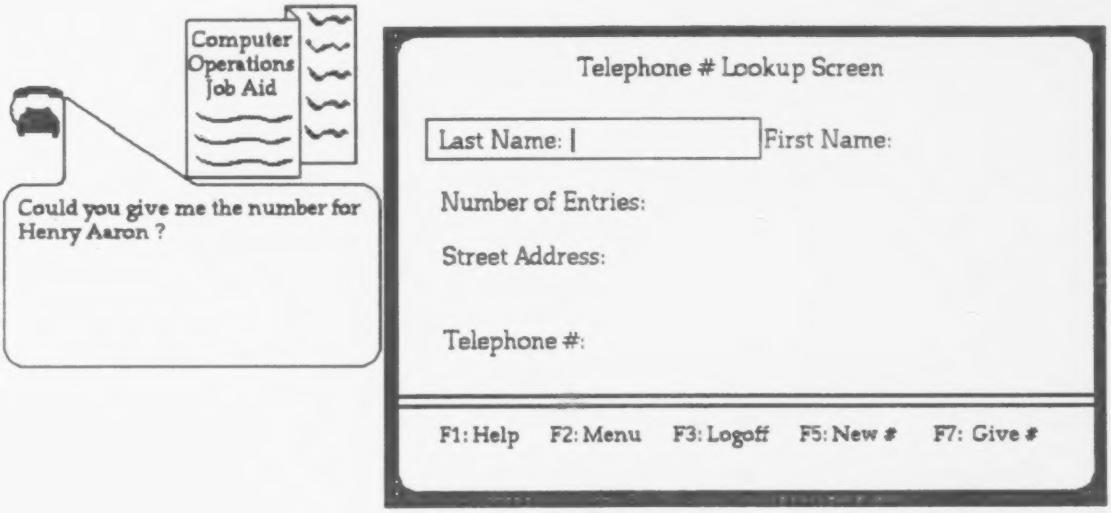
Street Address:

Telephone #:

F1: Help
F2: Menu
F3: Logoff
F5: New #
F7: Give #

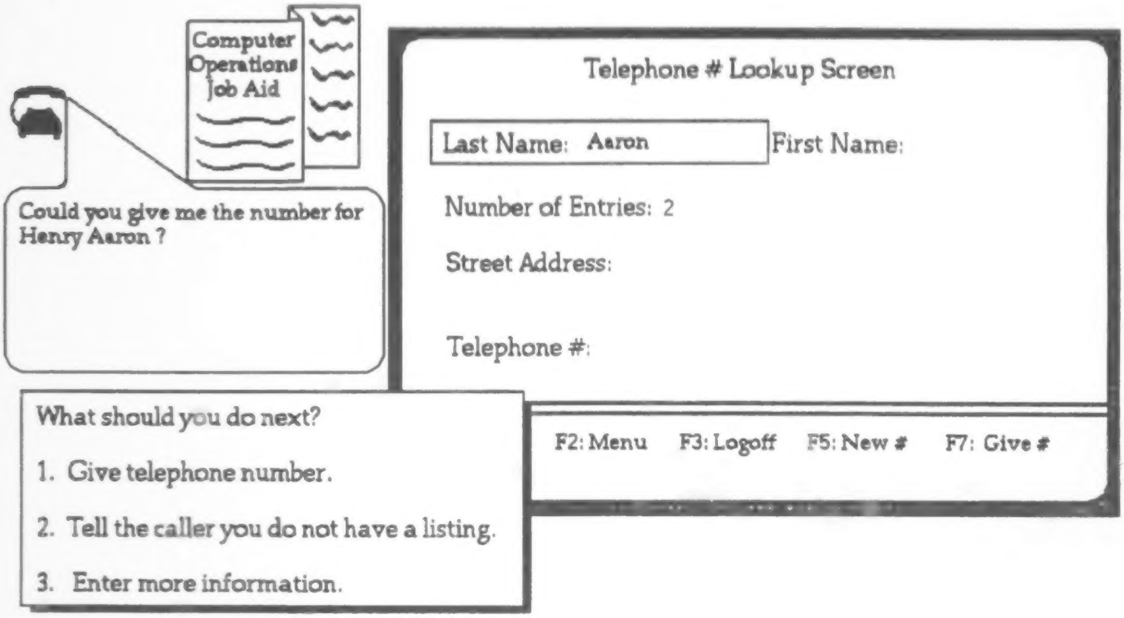
The method of entering information on these simulated computer screens was designed to mimic a typical system. To enter information in a field, learners press the Tab key until the box is around the desired field. Then learners must press Return or Enter to activate that field. When the blinking vertical bar cursor appears, learners can type information into the field. Learners can also use the Shift-Tab key combination to move backwards to the desired field.

When the learners are within a field, the arrow keys or the mouse will move the blinking vertical bar cursor to the desired position. Pressing the Delete or Backspace key will erase the character immediately to the left of the cursor. Pressing Return or Enter tells the computer to evaluate whatever the learners have typed.


Computer Operations Job Aid
Telephone # Lookup Screen
Last Name: |
First Name:
Number of Entries:
Street Address:
Telephone #:
F1: Help
F2: Menu
F3: Logoff
F5: New #
F7: Give #

Could you give me the number for Henry Aaron ?

Learners will receive different prompts and be asked different questions based on the information entered in the fields. In this example you see a metacognitive question asking learners what the next step is.

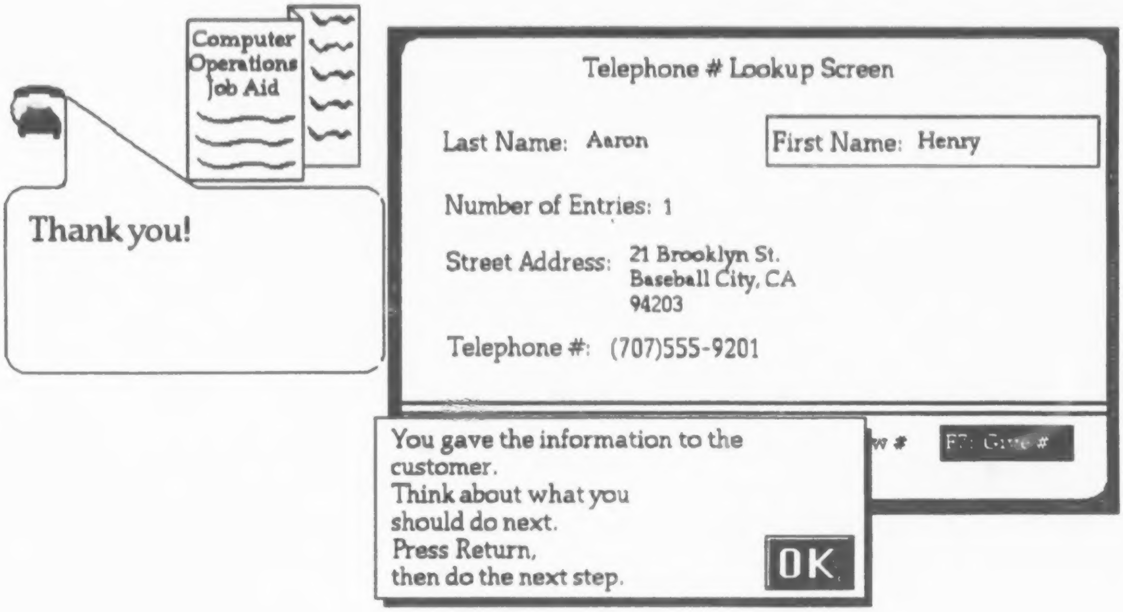

Computer Operations Job Aid
Could you give me the number for Henry Aaron ?
Telephone # Lookup Screen
F2: Menu
F3: Logoff
F5: New #
F7: Give #

Last Name: Aaron
First Name:
Number of Entries: 2
Street Address:
Telephone #:

What should you do next?

1. Give telephone number.
2. Tell the caller you do not have a listing.
3. Enter more information.

In general, learners must enter at least the last and first names to obtain a specific listing. In some cases, learners must also enter an address to narrow the number of listings down to a particular telephone number. After a learner obtains the correct listing, pressing F7 will give the number to the customer.



Telephone # Lookup Screen

Last Name: Aaron

First Name: Henry

Number of Entries: 1

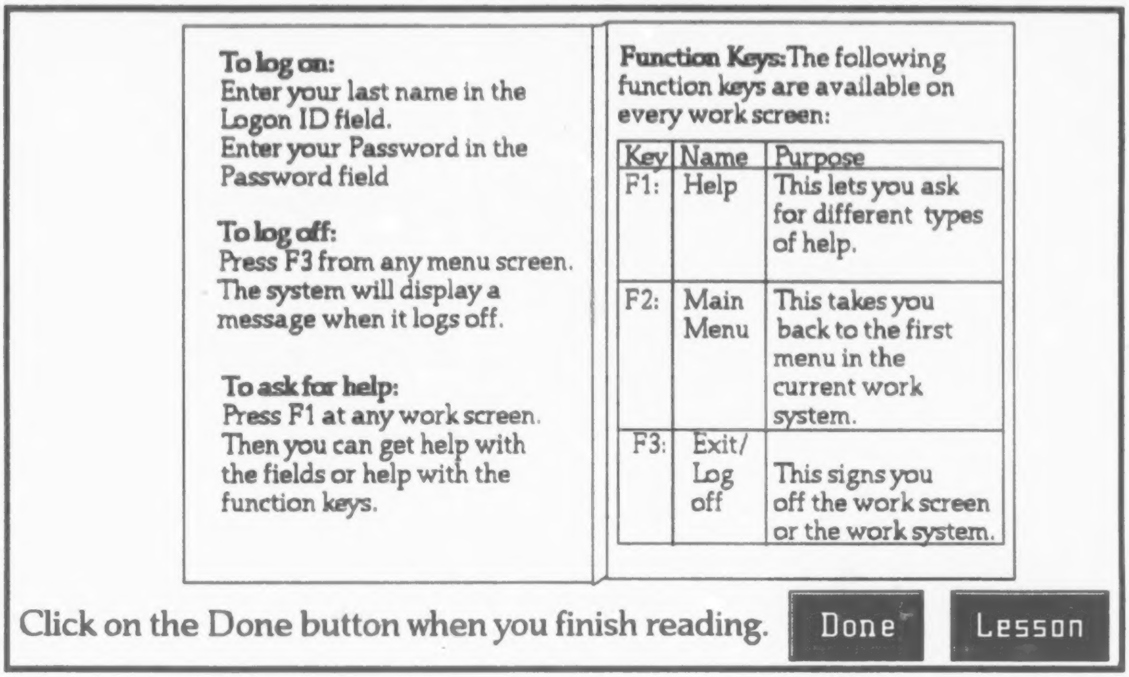
Street Address: 21 Brooklyn St.
Baseball City, CA
94203

Telephone #: (707)555-9201

You gave the information to the customer.
Think about what you should do next.
Press Return,
then do the next step.

After giving the telephone number to the customer, learners must prepare the system for entering a new telephone number. F5 will do this.

Learners may look at a Computer Operations Job Aid at any time. The job aid defines the most common procedures on the computer system.



To log on:
Enter your last name in the Logon ID field.
Enter your Password in the Password field

To log off:
Press F3 from any menu screen. The system will display a message when it logs off.

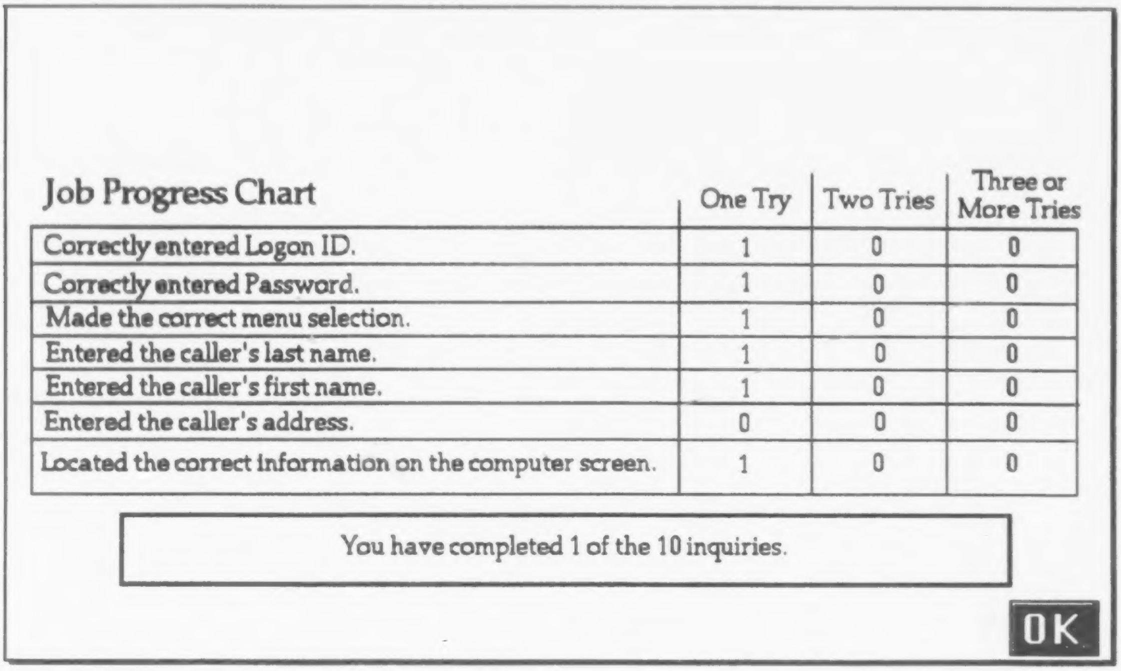
To ask for help:
Press F1 at any work screen. Then you can get help with the fields or help with the function keys.

Function Keys: The following function keys are available on every work screen:

Key	Name	Purpose
F1:	Help	This lets you ask for different types of help.
F2:	Main Menu	This takes you back to the first menu in the current work system.
F3:	Exit/ Log off	This signs you off the work screen or the work system.

Click on the Done button when you finish reading.

After correctly resetting the system by pressing F5, learners are shown a Job Progress Chart. This chart tells learners how many tries it took to correctly complete the task. It also indicates how many inquiries have been completed.



Job Progress Chart	One Try	Two Tries	Three or More Tries
Correctly entered Logon ID.	1	0	0
Correctly entered Password.	1	0	0
Made the correct menu selection.	1	0	0
Entered the caller's last name.	1	0	0
Entered the caller's first name.	1	0	0
Entered the caller's address.	0	0	0
Located the correct information on the computer screen.	1	0	0

You have completed 1 of the 10 inquiries.

After learners press **OK**, another customer calls and the process starts over. Learners will complete ten requests for information. A learner's cumulative progress is recorded each time a call is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.

If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 3: Simple Customer Contact—Overview

Prerequisites: Mastery of Module 1: **How to Use This Program**
Completion of Module 2: **Information Sharing—Overview**

The Simple Customer Contact Module teaches basic skills necessary for individuals who want to become customer service representatives and whose job requires simple contact with the customer. Tasks include finding complex information from various sources and questioning customers about their needs. This module has the following job scenarios:

1. helping a customer complete a form
2. giving product information to a customer
3. updating a manual
4. assisting a customer with billing inquiries

This module requires learners to use information obtained from a variety of sources similar to those they would find on the job, including charts, forms, manuals, and computer screens. The job scenarios are as typical and realistic as possible.

Learners must be ready to take notes when required and should have a supply of paper and pencils handy at all times.

Instructional Aids for the Learner:

Learners will follow a prescribed path to successfully perform the tasks in these scenarios. The learners can obtain help in a variety of ways. If learners need help reading a particular item, such as a form, the **Learn About** button will provide a list of lessons available on that item.

If the learner needs help deciding what to do next, the **Job** button provides a list of instructions for completing the job.

If the learner is not sure what help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Refer to Module 1 for more information about these buttons.

Module 3: Forms—Assist in Completing a Form

In this scenario, learners answer customer questions about completing Insurance Claim Forms. A customer calls them and asks them how to complete an Insurance Claim Form. The learners must locate the correct information and relay this information to the customer. Here are the objectives of this scenario:

Main objective:
The learner will select the appropriate information requested by the customer by using the Insurance Claim Form and the Insurance Claim Form Job Aid as reference materials.

Secondary objectives:

- The learner will ask the customer for information needed.
- The learner will make decisions about how to help the customer based on information from the Insurance Claim Form Job Aid.
- The learner will complete the call in a timely manner.

These are the basic skills presented in this scenario:

Reading Skills

Read and interpret specific information from written materials.
Read and interpret charts, graphs, tables, and forms.

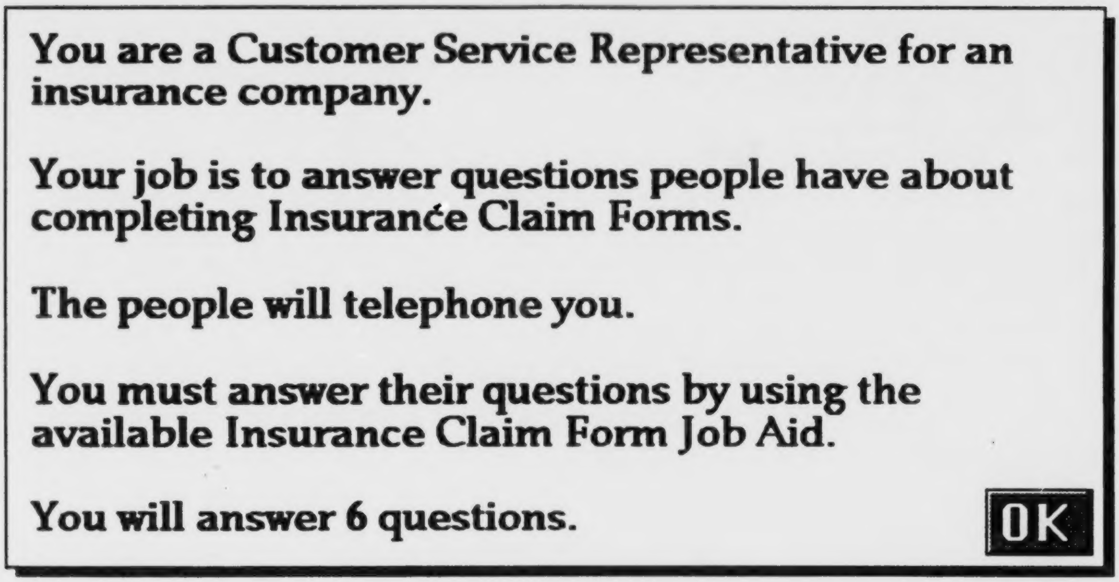
Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

This scenario has the following instructional units:

The Insurance Claim Form:
    What is a Form?
The Insurance Claim Form Job Aid:
    What is a Job Aid?

When the learners enter the scenario, they see this:



You are a Customer Service Representative for an insurance company.

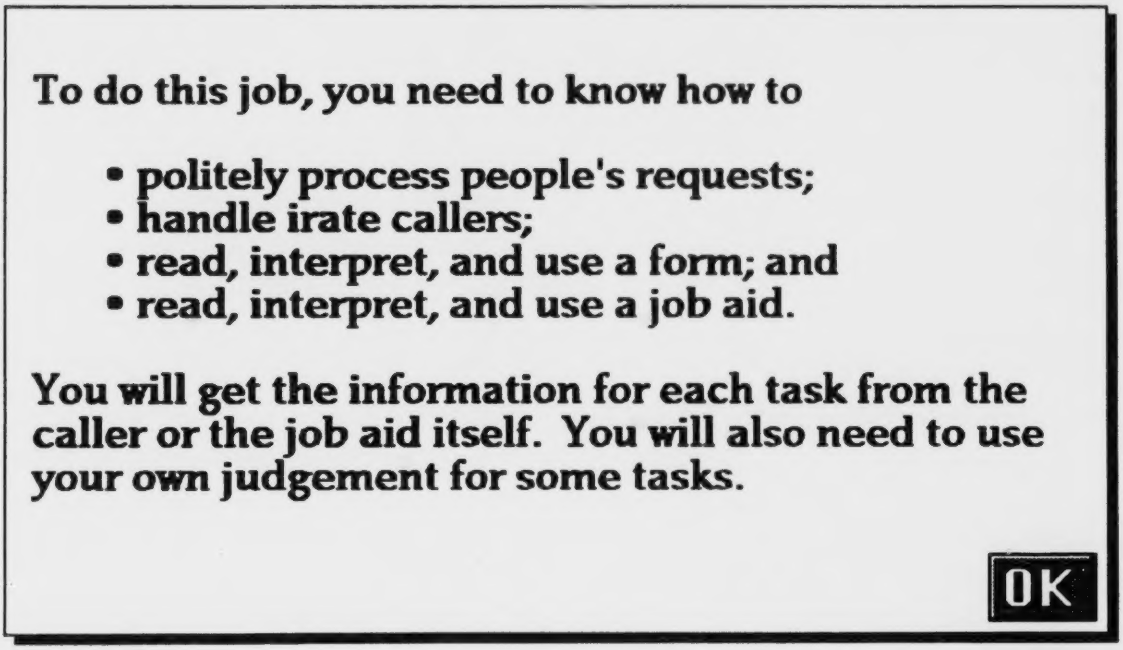
Your job is to answer questions people have about completing Insurance Claim Forms.

The people will telephone you.

You must answer their questions by using the available Insurance Claim Form Job Aid.

You will answer 6 questions.

Then they are told the types of skills they will need to complete the scenario.

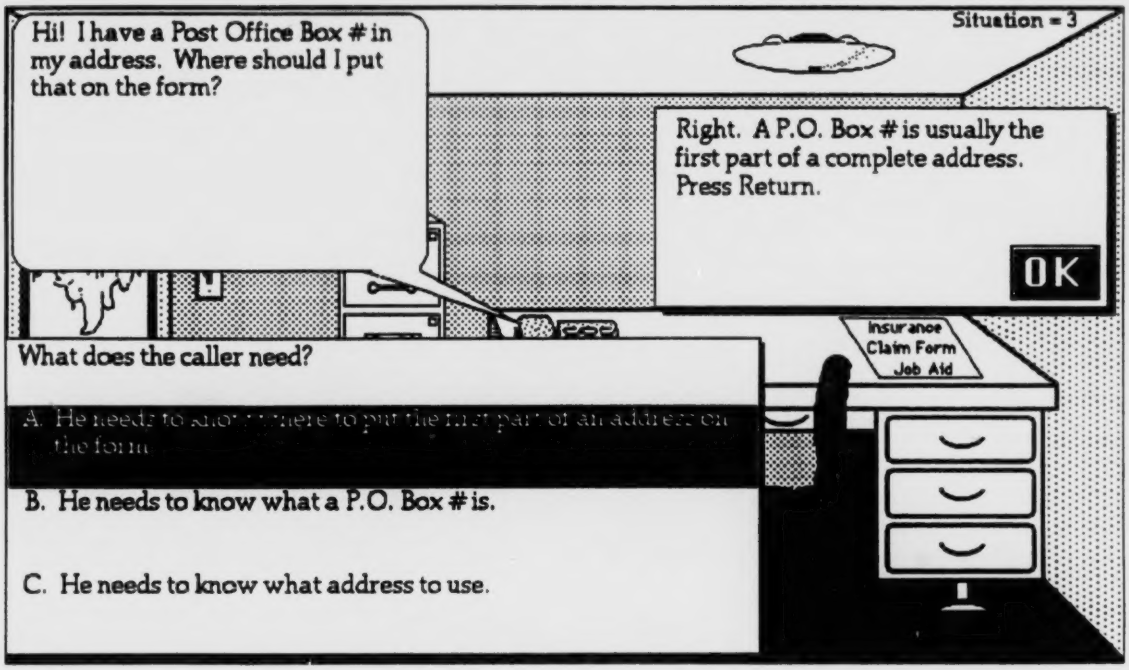


To do this job, you need to know how to

- politely process people's requests;
- handle irate callers;
- read, interpret, and use a form; and
- read, interpret, and use a job aid.

You will get the information for each task from the caller or the job aid itself. You will also need to use your own judgement for some tasks.

Learners will be asked questions to insure understanding of the problem. Learners will need to use the Insurance Claim Form and the Insurance Claim Form Job Aid to look up the requested information. Learners will complete six requests for information.



Hi! I have a Post Office Box # in my address. Where should I put that on the form?

Right. A P.O. Box # is usually the first part of a complete address. Press Return.

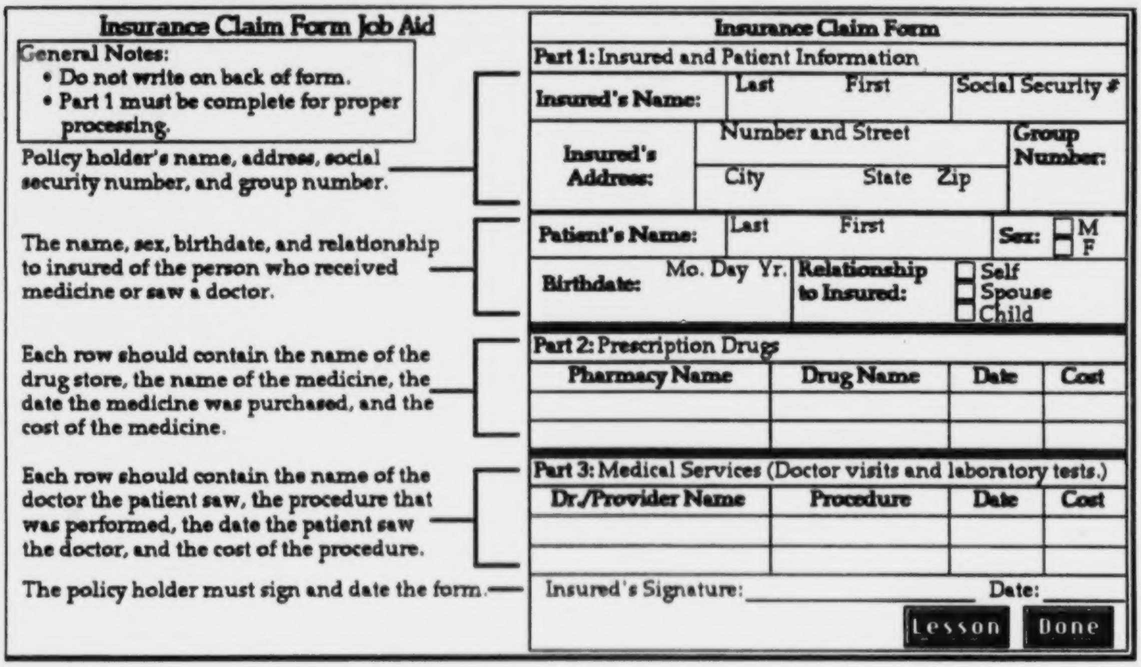
What does the caller need?

A. He needs to know where to put the first part of an address on the form

B. He needs to know what a P.O. Box # is.

C. He needs to know what address to use.

To locate the correct information on the job aid, learners must click on the **Look At** button and then on the job aid.



Insurance Claim Form Job Aid

General Notes:

- Do not write on back of form.
- Part 1 must be complete for proper processing.

Policy holder's name, address, social security number, and group number.

The name, sex, birthdate, and relationship to insured of the person who received medicine or saw a doctor.

Each row should contain the name of the drug store, the name of the medicine, the date the medicine was purchased, and the cost of the medicine.

Each row should contain the name of the doctor the patient saw, the procedure that was performed, the date the patient saw the doctor, and the cost of the procedure.

The policy holder must sign and date the form.

Insurance Claim Form

Part 1: Insured and Patient Information

Insured's Name: Last First Social Security #

Insured's Address: Number and Street City State Zip

Group Number:

Patient's Name: Last First

Sex: ☐ M ☐ F

Birthdate: Mo. Day Yr.

Relationship to Insured: ☐ Self ☐ Spouse ☐ Child

Part 2: Prescription Drugs

Pharmacy Name	Drug Name	Date	Cost

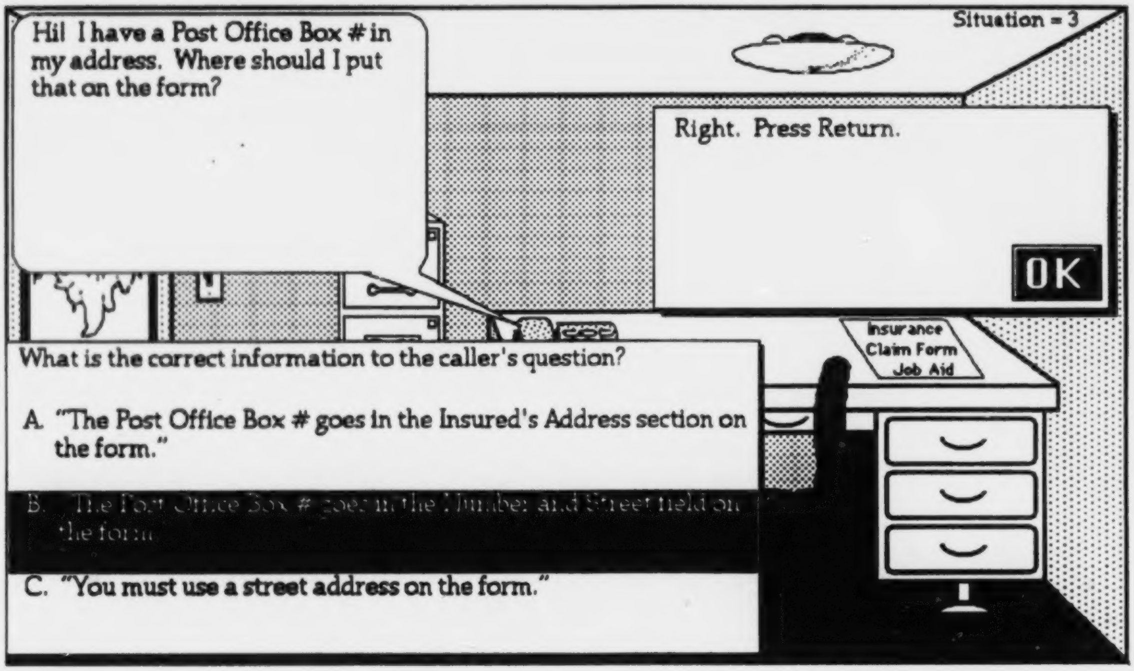
Part 3: Medical Services (Doctor visits and laboratory tests.)

Dr./Provider Name	Procedure	Date	Cost

Insured's Signature:________________ Date:______

After reading the information on the form, learners can either request a lesson on the job aid or go on. To go on, learners click on the **Done** button.

At this point a question about the solution is presented.



Hi! I have a Post Office Box # in my address. Where should I put that on the form?

Right. Press Return.

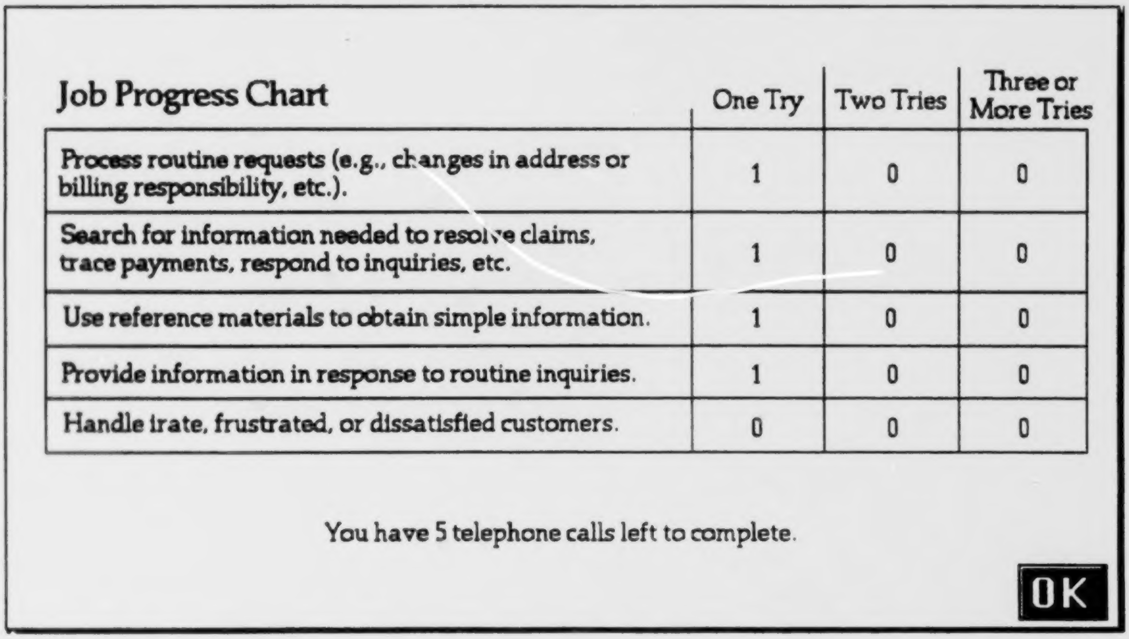
What is the correct information to the caller's question?

A. "The Post Office Box # goes in the Insured's Address section on the form."

B. The Post Office Box # goes in the Number and Street field on the form.

C. "You must use a street address on the form."

After answering several questions, learners receive a Job Progress Chart.



Job Progress Chart	One Try	Two Tries	Three or More Tries
Process routine requests (e.g., changes in address or billing responsibility, etc.).	1	0	0
Search for information needed to resolve claims, trace payments, respond to inquiries, etc.	1	0	0
Use reference materials to obtain simple information.	1	0	0
Provide information in response to routine inquiries.	1	0	0
Handle irate, frustrated, or dissatisfied customers.	0	0	0

You have 5 telephone calls left to complete.

After clicking **OK**, learners will receive another call until six calls are completed. A learner's cumulative progress is recorded each time a call is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.

If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 3: Charts—Product Information

In this scenario, learners look up information on a chart. A customer either calls or walks in and asks a question concerning interest rates and other information on various banking services. Learners must decide which chart to use and then locate the correct information on the chart based on the question asked. Here are the objectives of this scenario:

Main objective:
The learners will select the appropriate information requested by the customer by referencing either the Interest Rate Chart or the Product Information Chart.

Secondary objectives:

- The learner will ask the customer for information needed.
- The learner will decide which chart contains the needed information.
- The learner will make decisions about what information to give to the customer based on the Interest Rate Chart or the Product Information Chart.
- The learner will complete the inquiry in a timely manner.

These are the basic skills presented in this scenario:

Reading Skills

Read and interpret specific information from written materials.
Read and interpret charts, graphs, tables, and forms.

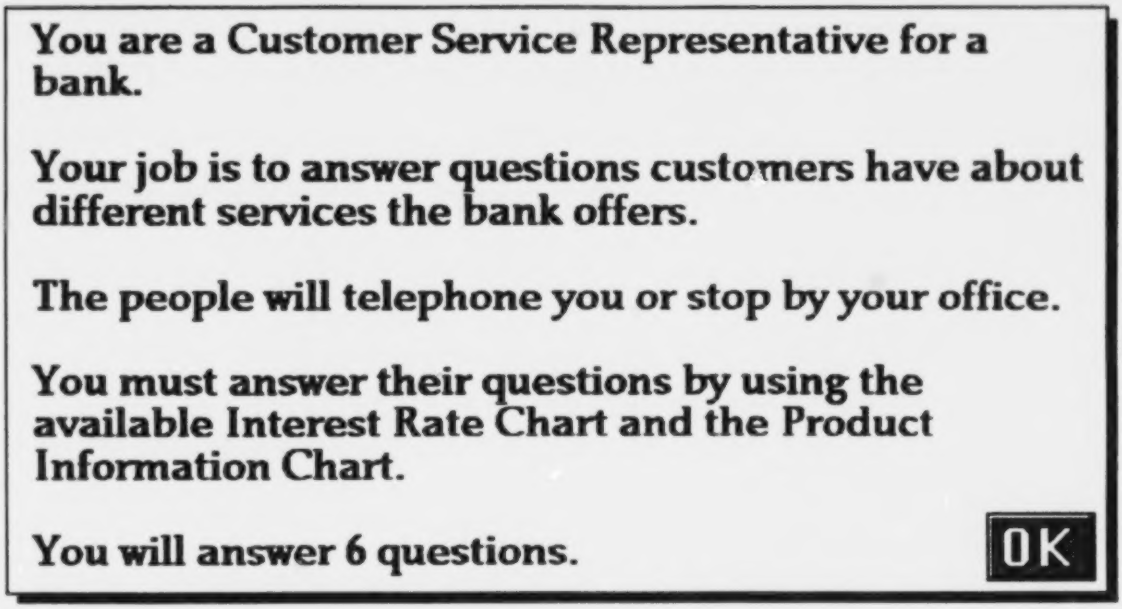
Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

This scenario has the following instructional units:

The Interest Rate Chart:
    What is a Chart?
The Product Information Chart:
    What is a Chart?

When the learners enter the scenario, they see this:



You are a Customer Service Representative for a bank.

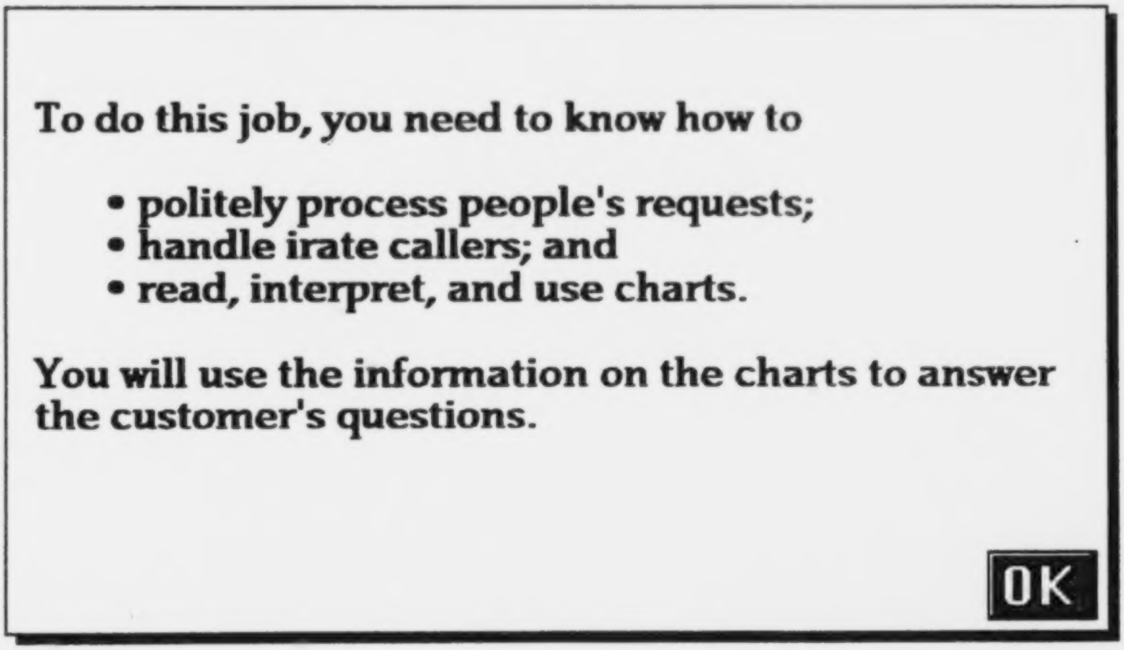
Your job is to answer questions customers have about different services the bank offers.

The people will telephone you or stop by your office.

You must answer their questions by using the available Interest Rate Chart and the Product Information Chart.

You will answer 6 questions.

Then they are told the types of skills they will need to complete the scenario.

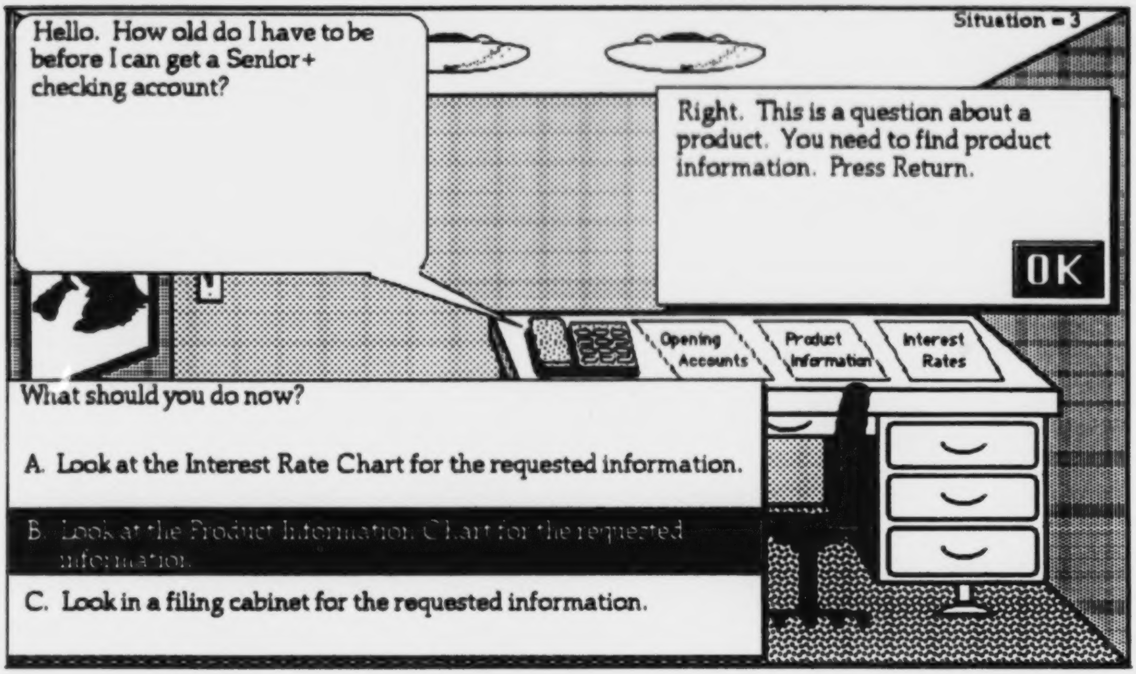


To do this job, you need to know how to

- politely process people's requests;
- handle irate callers; and
- read, interpret, and use charts.

You will use the information on the charts to answer the customer's questions.

At this point, either a telephone will ring or a customer will appear and ask a question. Learners will be asked questions that will help to determine how to solve the problem. Learners will need to locate the correct chart and look up the requested information. Learners will complete six requests for information.



Hello. How old do I have to be before I can get a Senior+ checking account?

Right. This is a question about a product. You need to find product information. Press Return.

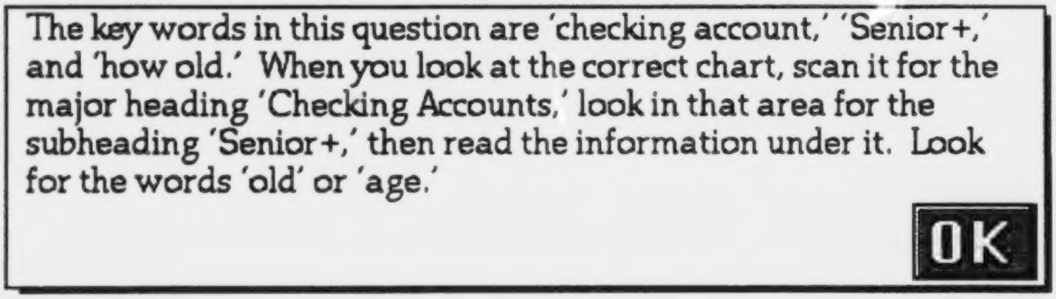
What should you do now?

A. Look at the Interest Rate Chart for the requested information.

B. Look at the Product Information Chart for the requested information.

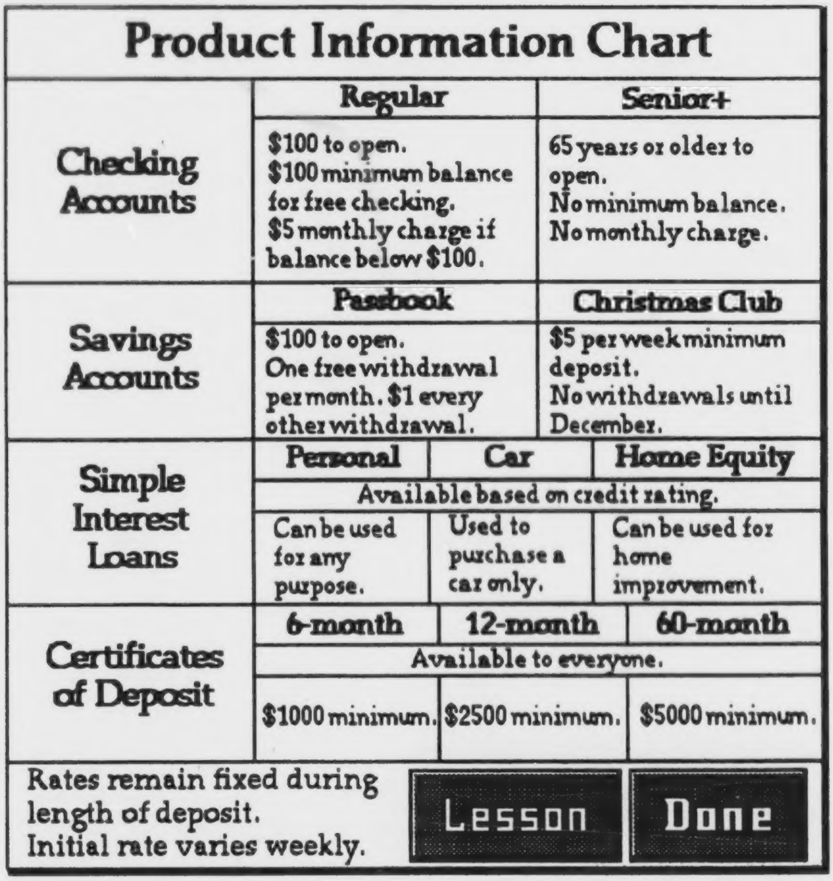
C. Look in a filing cabinet for the requested information.

To help learners understand the nature of the request and focus on the correct information, some thinking prompts will appear.



The key words in this question are 'checking account,' 'Senior+,' and 'how old.' When you look at the correct chart, scan it for the major heading 'Checking Accounts,' look in that area for the subheading 'Senior+,' then read the information under it. Look for the words 'old' or 'age.'

To look at the correct chart, learners click on the **Look At** button and then on the desired chart.



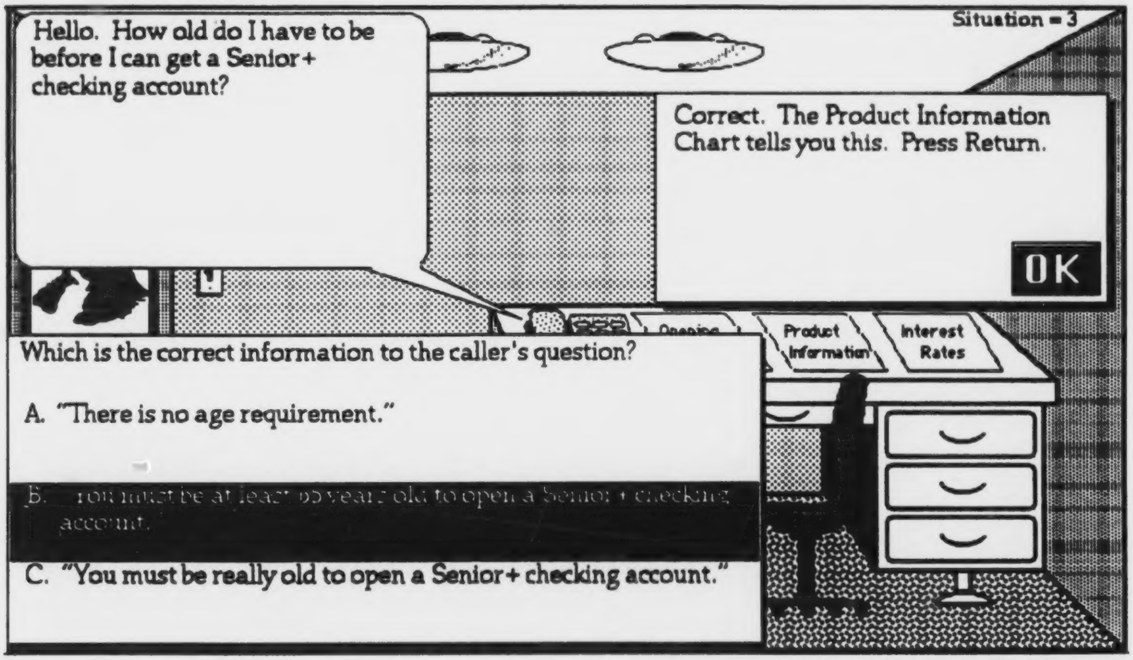
Product Information Chart

Checking Accounts	**Regular**		**Senior+**
	$100 to open. $100 minimum balance for free checking. $5 monthly charge if balance below $100.		65 years or older to open. No minimum balance. No monthly charge.
Savings Accounts	**Passbook**		**Christmas Club**
	$100 to open. One free withdrawal per month. $1 every other withdrawal.		$5 per week minimum deposit. No withdrawals until December.
Simple Interest Loans	**Personal**	**Car**	**Home Equity**
	Available based on credit rating.		
	Can be used for any purpose.	Used to purchase a car only.	Can be used for home improvement.
Certificates of Deposit	**6-month**	**12-month**	**60-month**
	Available to everyone.		
	$1000 minimum.	$2500 minimum.	$5000 minimum.

Rates remain fixed during length of deposit.
Initial rate varies weekly.

After reading the information on the chart, learners can either request a lesson on the chart or go on. To go on, learners click on the **Done** button.

A question about the solution is then presented.



Hello. How old do I have to be before I can get a Senior+ checking account?

Correct. The Product Information Chart tells you this. Press Return.

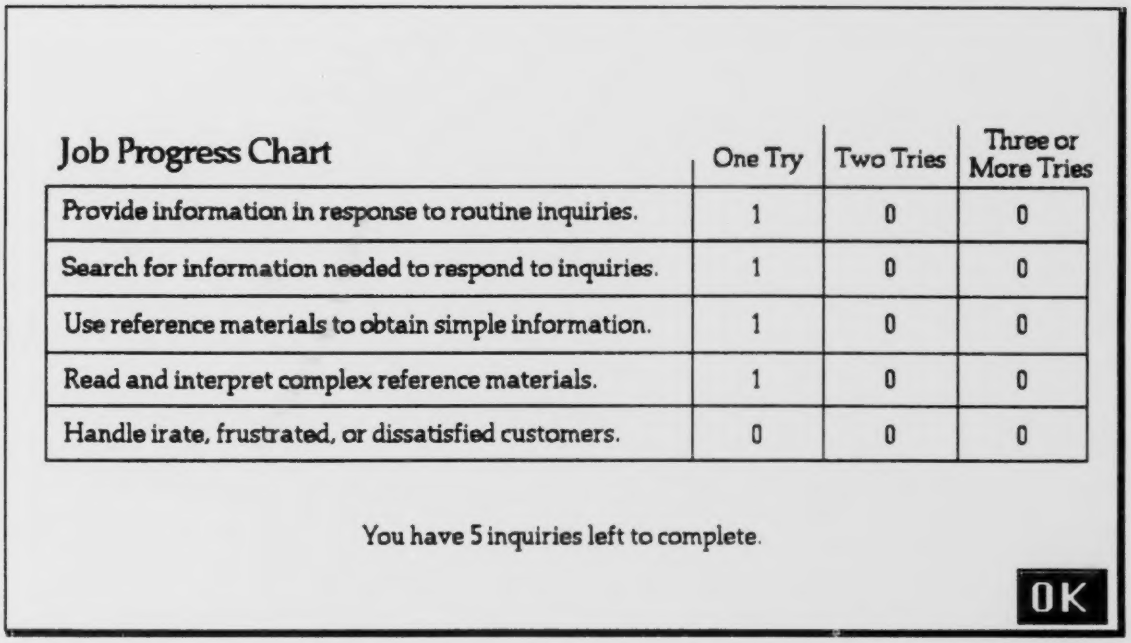
Which is the correct information to the caller's question?

A. "There is no age requirement."

B. "You must be at least 55 years old to open a Senior+ checking account."

C. "You must be really old to open a Senior+ checking account."

After answering the question, learners receive a Job Progress Chart.



Job Progress Chart	One Try	Two Tries	Three or More Tries
Provide information in response to routine inquiries.	1	0	0
Search for information needed to respond to inquiries.	1	0	0
Use reference materials to obtain simple information.	1	0	0
Read and interpret complex reference materials.	1	0	0
Handle irate, frustrated, or dissatisfied customers.	0	0	0

You have 5 inquiries left to complete.

After clicking **OK**, learners will receive another interaction until six interactions are completed. A learner's cumulative progress is recorded each time an interaction is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.

If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 3: Manuals—Updating a Manual

In this scenario, learners update the information found in a manual. They receive a memo indicating the changes to be made. The learners must locate the information in the manual as described in the memo and make the correct changes to the manual. Here are the objectives of this scenario:

Main objective:
The learner will perform the appropriate action based on information in a given memo.

Secondary objectives:
- The learner will select the correct page in the manual to change.
- The learner will make the appropriate change in the manual.

These are the basic skills presented in this scenario:

Reading Skills
Use reference materials in manuals.
Read and interpret specific information from memos.
Read and interpret written instructions from instructor and supervisor.
Read and interpret sequential directions in manuals.
Use table of contents, index, and appendices in manuals.

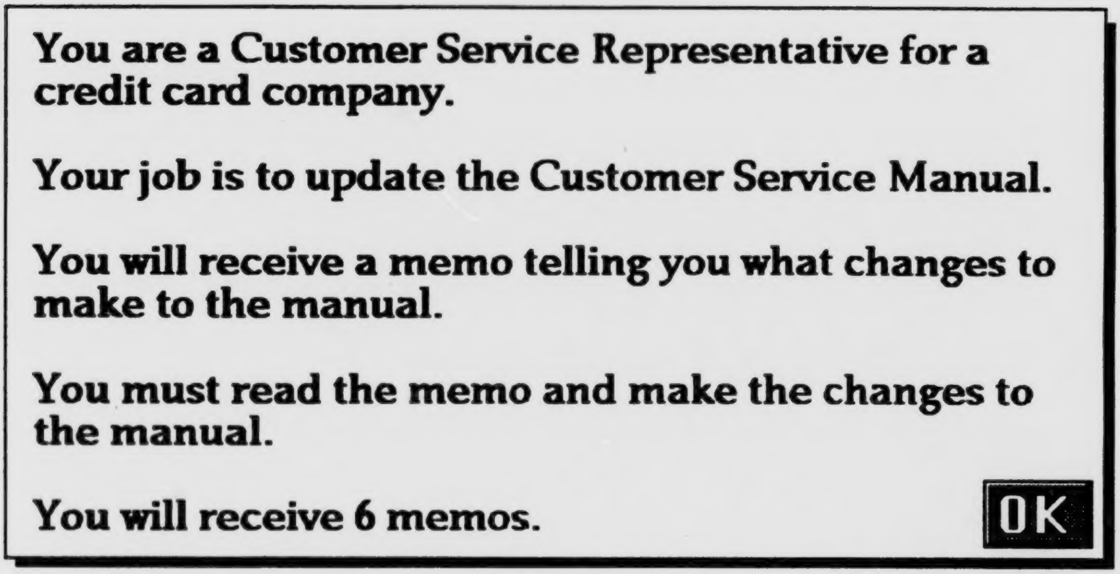
Writing Skills
Record requested information on manuals.

Organizational and Learning Skills
Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

This scenario has the following instructional units:

The Customer Service Manual:
    How to Use a Manual.
    How to Use the Table of Contents.
    How to Use an Index.
    How to Use Headings.
The Customer Service Manual Memo:
    What is a Memo?
    What are the Parts of a Memo?

When the learners enter the scenario, they see this:



You are a Customer Service Representative for a credit card company.

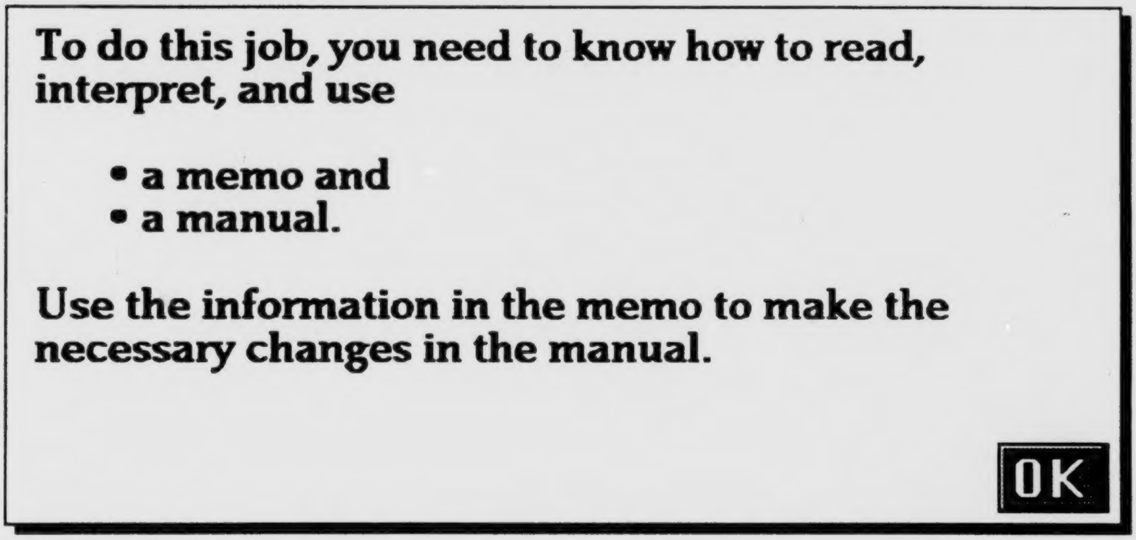
Your job is to update the Customer Service Manual.

You will receive a memo telling you what changes to make to the manual.

You must read the memo and make the changes to the manual.

You will receive 6 memos.

Then they are told the types of skills they will need to complete the scenario.

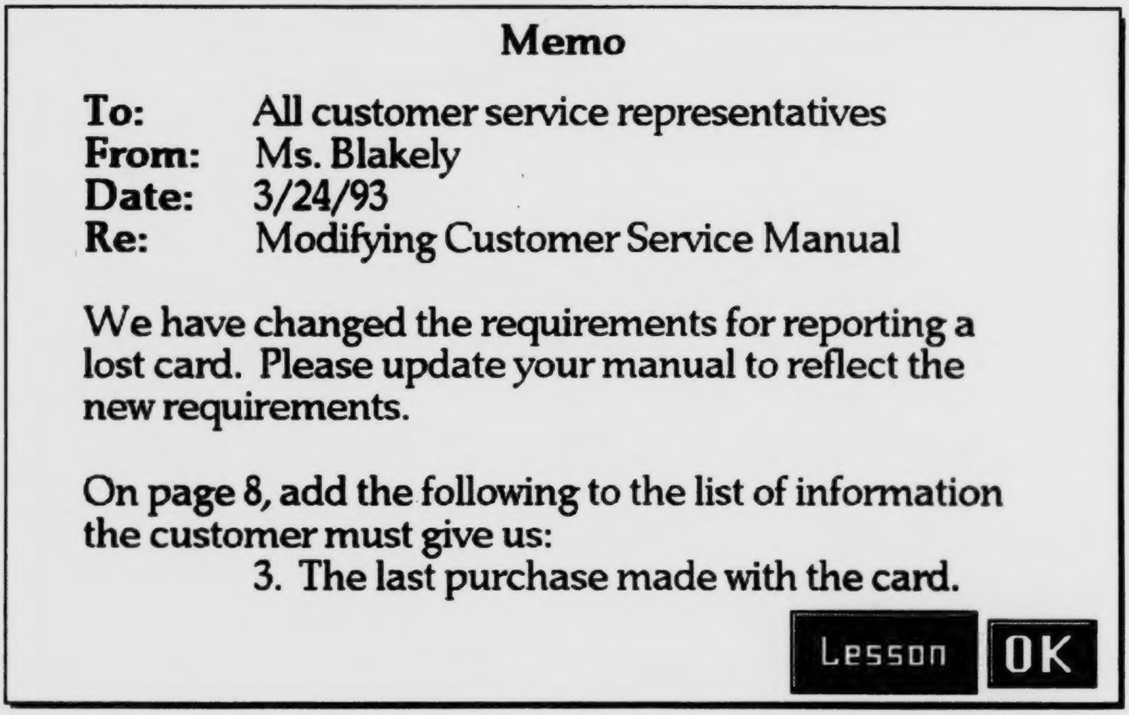


To do this job, you need to know how to read, interpret, and use

- **a memo and**
- **a manual.**

Use the information in the memo to make the necessary changes in the manual.

At this point, someone walks into the office and places a memo on the desk. The learners will be prompted to look at the memo. To do this, learners click on the **Look At** button and then on the memo. The learners will then need to follow the directions in the memo. The learners will complete six manual updates. Here is a sample memo:



Memo

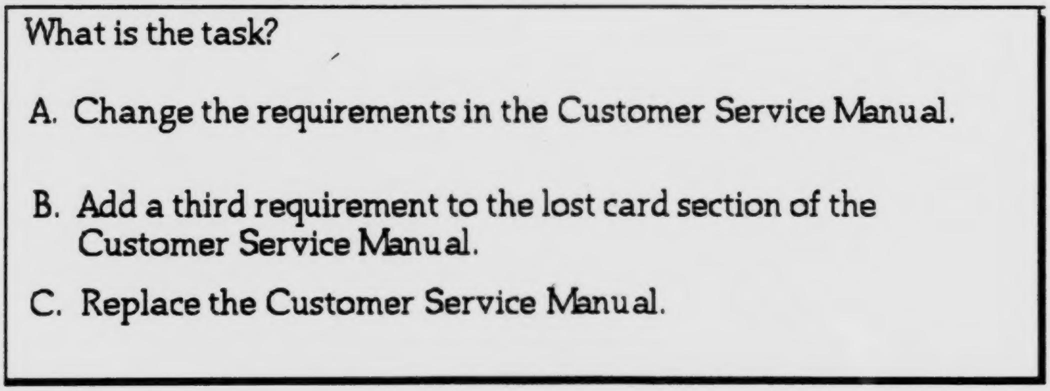
To: All customer service representatives
From: Ms. Blakely
Date: 3/24/93
Re: Modifying Customer Service Manual

We have changed the requirements for reporting a lost card. Please update your manual to reflect the new requirements.

On page 8, add the following to the list of information the customer must give us:

3. The last purchase made with the card.

The learners need to read the memo. A lesson on the memo can be requested by clicking on the **Lesson** button. The learners click on the **OK** button when they understand the memo. The computer will ask a question to make sure that the learners understand the problem.



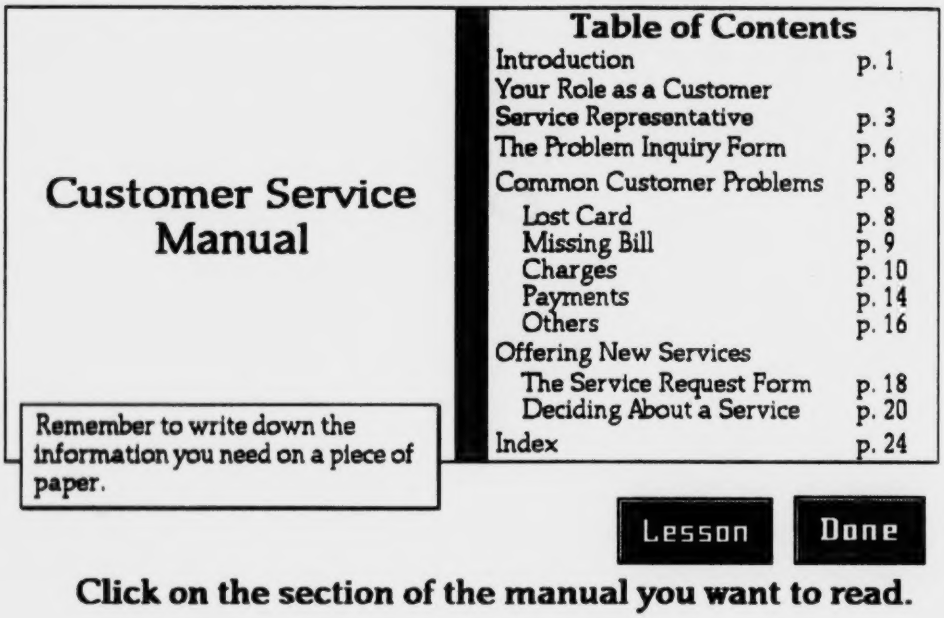
What is the task?

A. Change the requirements in the Customer Service Manual.

B. Add a third requirement to the lost card section of the Customer Service Manual.

C. Replace the Customer Service Manual.

The learners will be asked a few more questions, and then will be prompted to make the corrections to the Customer Service Manual. To do this, learners click on the **Look At** button and then on the Customer Service Manual.



Customer Service Manual

Table of Contents

Introduction p. 1
Your Role as a Customer Service Representative p. 3
The Problem Inquiry Form p. 6
Common Customer Problems p. 8
  Lost Card p. 8
  Missing Bill p. 9
  Charges p. 10
  Payments p. 14
  Others p. 16

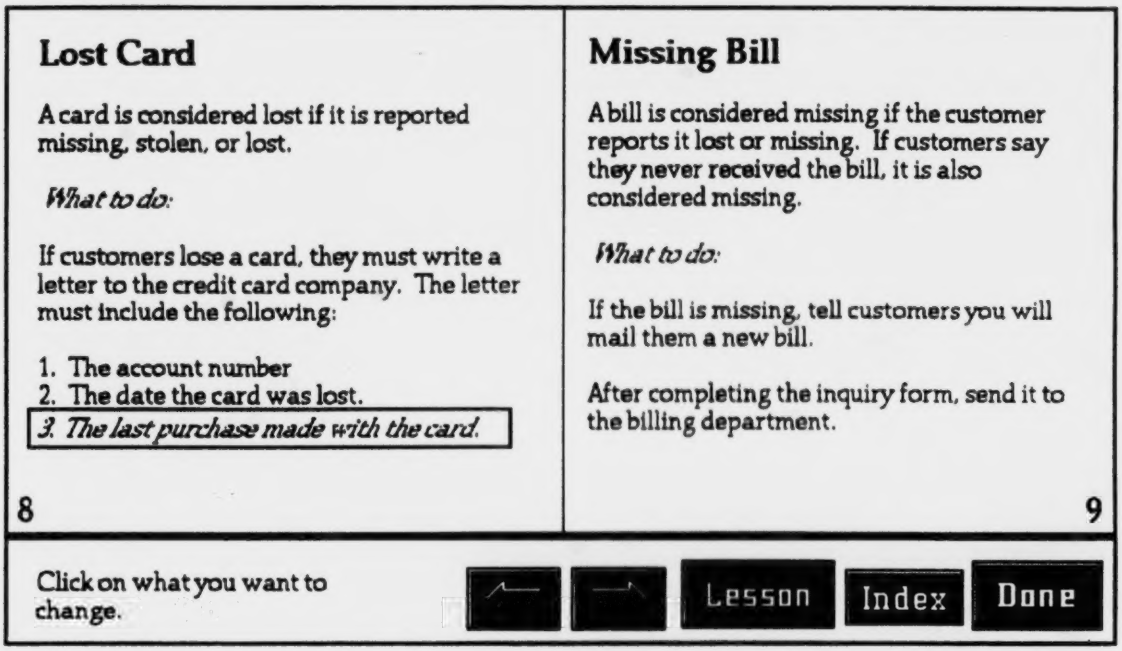
Offering New Services

  The Service Request Form p. 18
  Deciding About a Service p. 20
Index p. 24

Remember to write down the information you need on a piece of paper.

Click on the section of the manual you want to read.

At this point the learners need to decide how to find the correct place in the manual to make the update. A lesson on the Table of Contents can be requested by clicking on the **Lesson** button. They can click on a section of the Table of Contents or go to the Index and select a topic there. The computer will prompt them as necessary. The learners then make the necessary correction to the manual:



Lost Card

A card is considered lost if it is reported missing, stolen, or lost.

What to do:

If customers lose a card, they must write a letter to the credit card company. The letter must include the following:

1. The account number
2. The date the card was lost.
3. *The last purchase made with the card.*

8

Missing Bill

A bill is considered missing if the customer reports it lost or missing. If customers say they never received the bill, it is also considered missing.

What to do:

If the bill is missing, tell customers you will mail them a new bill.

After completing the inquiry form, send it to the billing department.

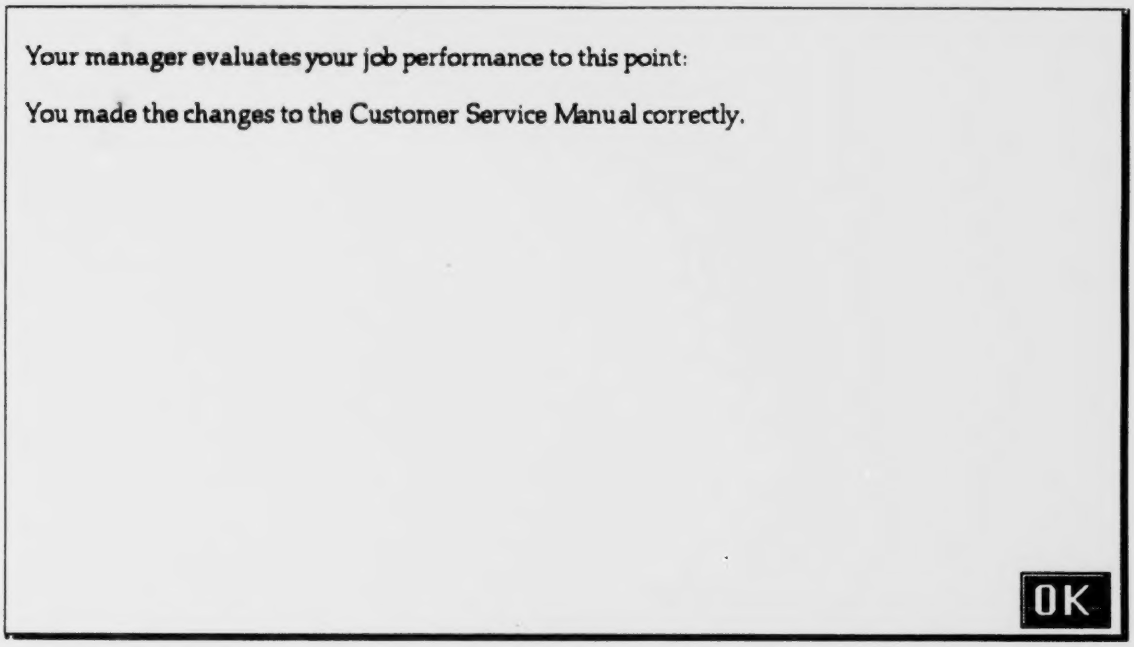
9

Click on what you want to change.

To enter information in the correct place, learners first must click on the area. A box with a thick black border outlines the area. When the blinking vertical bar cursor appears, learners can type information into the field.

When the learners are within a field, the arrow keys or the mouse will move the blinking vertical bar cursor to the desired position. Pressing the Delete or Backspace key will erase the character immediately to the left of the cursor. Pressing Return or Enter tells the computer that the learners are finished typing in that area. Learners can then click on the next area to change, repeating the process listed above.

When the learners have made the correction and clicked on the **Done** button, they receive feedback on their performance. A lesson on the manual can also be requested by clicking on the **Lesson** button.



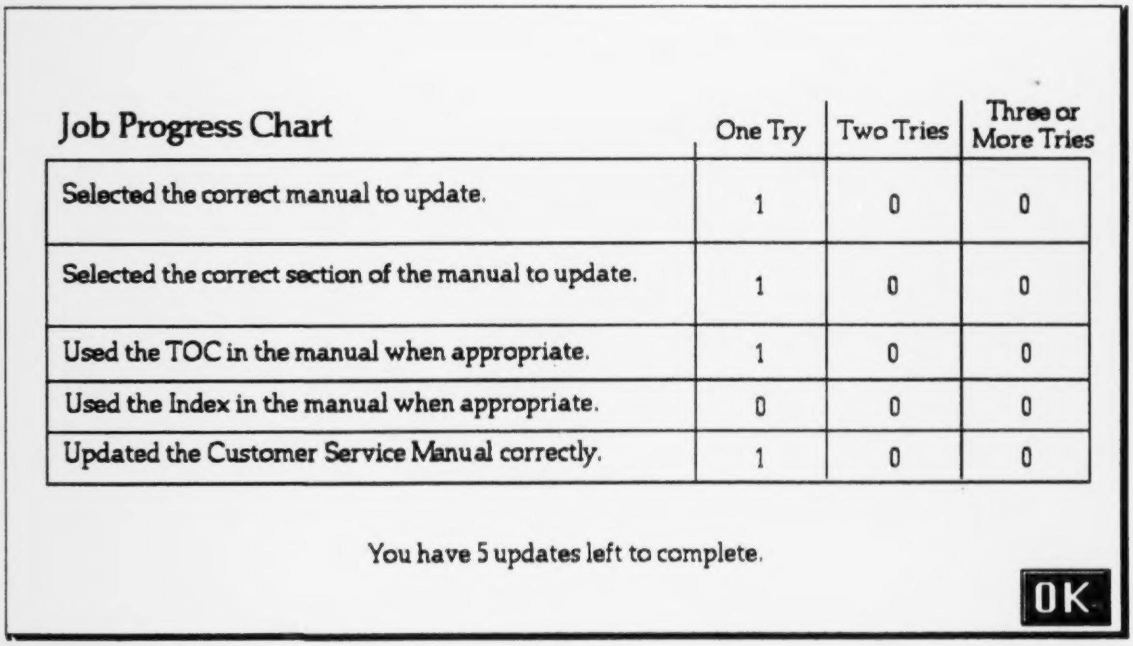
Your manager evaluates your job performance to this point:

You made the changes to the Customer Service Manual correctly.

If the learners make mistakes, the feedback states what is incorrect and the learners are given another chance to make the correct change. This guides the learners to the proper solution. If the learners make repeated mistakes, training lessons are provided to teach the learners how to use the memo and the manual.

In one special case a memo will not be addressed to the learners. This introduces a small problem-solving situation on what to do when things go wrong on the job. The computer will prompt the learners on what to do with that memo.

The learners are then asked some more questions about completing the call. Then the learners receive a Job Progress Chart.



Job Progress Chart

	One Try	Two Tries	Three or More Tries
Selected the correct manual to update.	1	0	0
Selected the correct section of the manual to update.	1	0	0
Used the TOC in the manual when appropriate.	1	0	0
Used the Index in the manual when appropriate.	0	0	0
Updated the Customer Service Manual correctly.	1	0	0

You have 5 updates left to complete.

After clicking **OK**, the learners will receive another memo until six manual updates are completed. A learner's cumulative progress is recorded each time an update is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.

If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 3: Computers—Assisting a Customer with a Billing Inquiry

In this scenario, learners help the customer find the answer to a billing question by using a computer system. A customer calls and asks for specific information about the telephone bill. The learners must locate the correct information by completing computer screens. Here are the objectives of this scenario:

Main objective:

The learner will take the appropriate action based on information requested by the customer. This information will be obtained from the customer and a computer database.

Secondary objectives:

- The learner will log on and log off the computer.
- The learner will ask the customer for information needed.
- The learner will complete the computer screen with information obtained from the customer.
- The learner will make decisions about what information is needed based on the computer screen information.
- The learner will use the appropriate F-keys based on the computer screen instructions.
- The learner will complete the call in a timely manner.

These are the basic skills presented in this scenario:

Reading Skills

Read and interpret sequential directions in textbooks, manuals, and handouts.
Read and interpret basic instructions in operating equipment.
Read directions and interpret basic computer materials, e.g., printouts, software programs, etc.

Writing Skills

Record date, time, and other requested information on work forms.

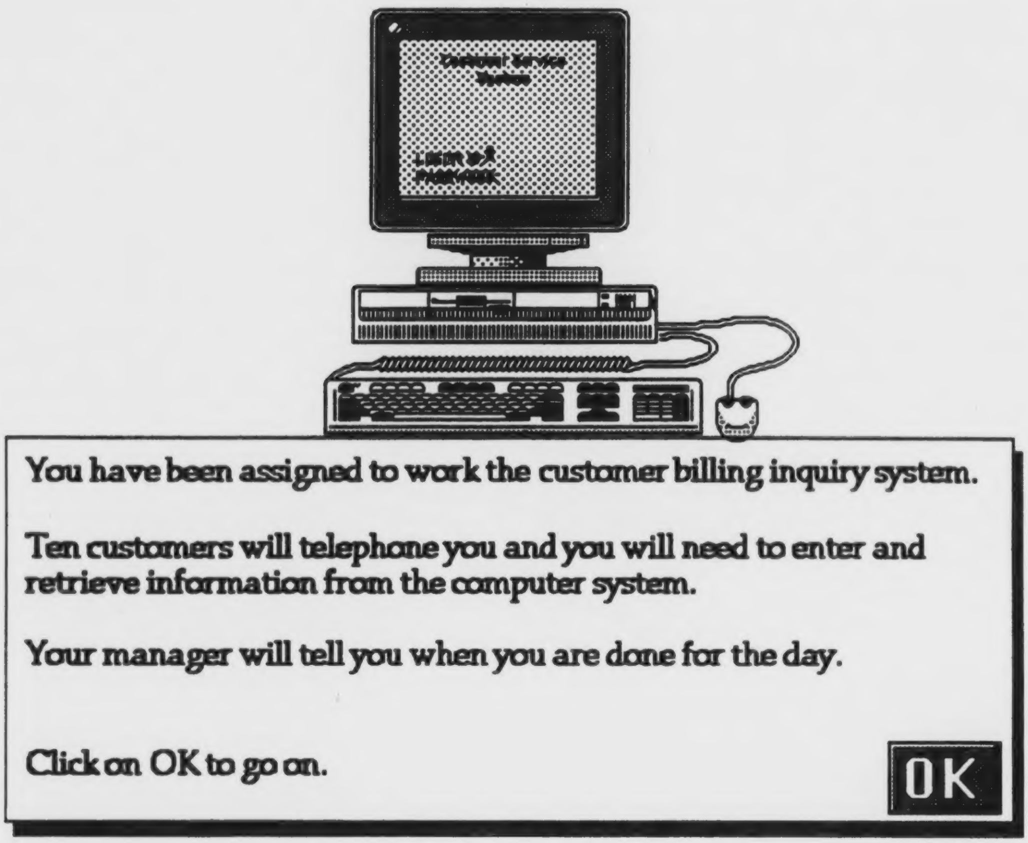
Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

This scenario includes the following instructional units:

- The Computer Operations Job Aid:
    - What is a Job Aid?
- The Logon Screen:
    - What are Computer Screen Fields?
    - What are Computer Messages?
    - How to Ask for Help.
    - How to Enter Information.
- The Customer Service Selection Menu:
    - What are Computer Screen Fields?
    - What are Computer Messages?
    - How to Ask for Help.
- The Billing Inquiry Screen:
    - What are Computer Screen Fields?
    - What are Function Keys?
    - What are Computer Messages?
    - How to Enter Information.
    - How to Ask for Help.

As soon as the learners enter the scenario, they see this:



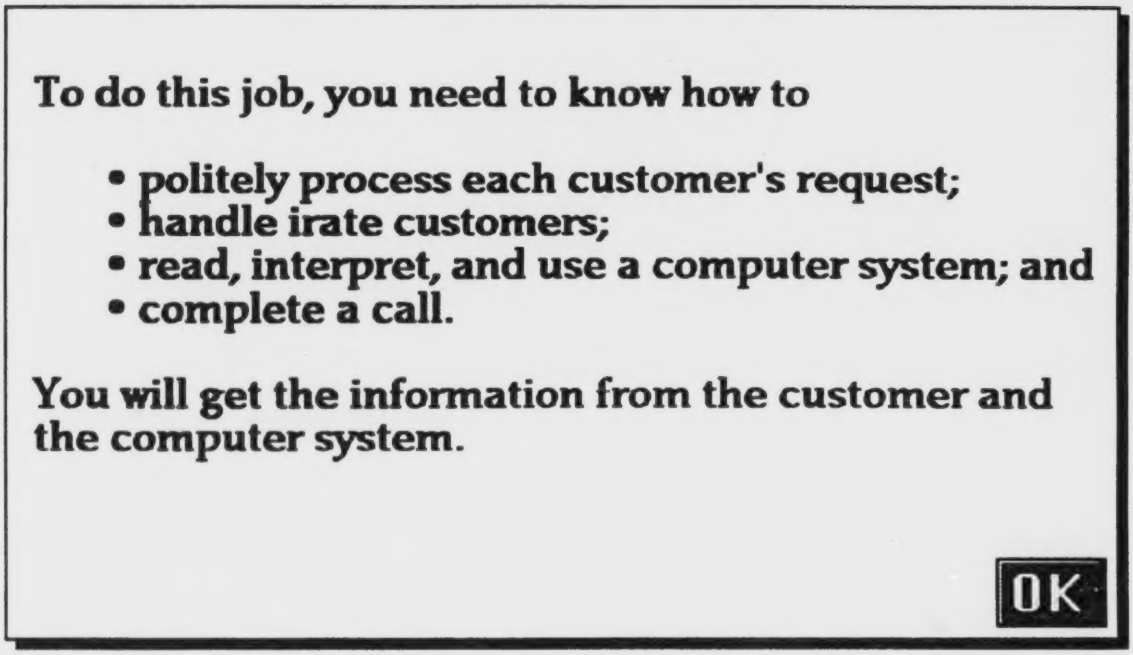
You have been assigned to work the customer billing inquiry system.

Ten customers will telephone you and you will need to enter and retrieve information from the computer system.

Your manager will tell you when you are done for the day.

Click on OK to go on.

Then they are told the types of skills they will need to complete the scenario.



To do this job, you need to know how to

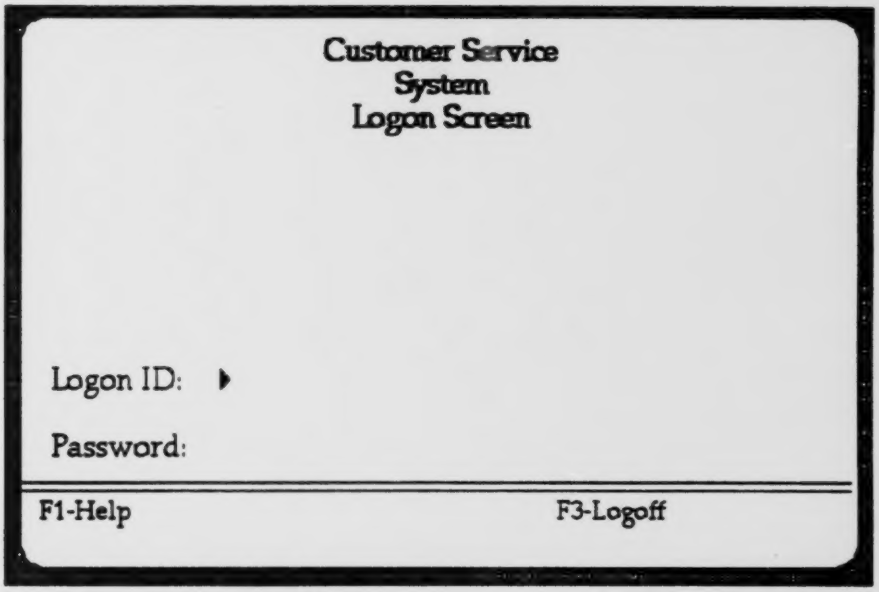
- politely process each customer's request;
- handle irate customers;
- read, interpret, and use a computer system; and
- complete a call.

You will get the information from the customer and the computer system.

After clicking OK, the learners are prompted to complete the Logon Screen. They first enter the Logon ID and press Enter. Then they enter the password and press Enter.

The learners are reminded of their Logon ID and password. If necessary, the learners receive a lesson on IDs and passwords (see Module 2: Computers for a detailed explanation of this process).

Computer
Operations
Job Aid



Customer Service
System
Logon Screen

Logon ID: ▸

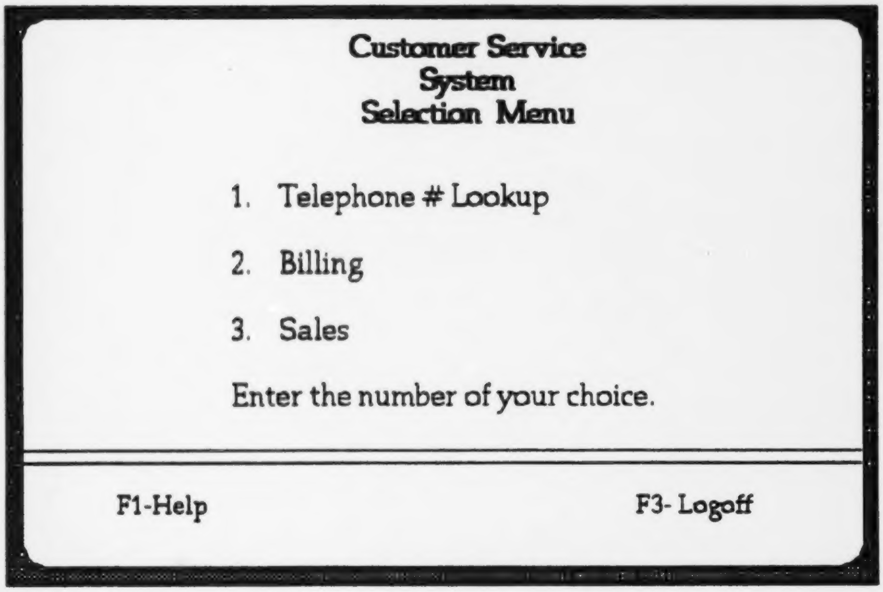
Password:

F1-Help
F3-Logoff

Enter your Logon ID now.
Type in your Logon ID, and press Enter.

Then they are taken to the Customer Service System Selection Menu. For this scenario, they should select option 2, Billing Inquiry. If the learners select other menu choices, they are prompted to select option 2.

Computer Operations Job Aid



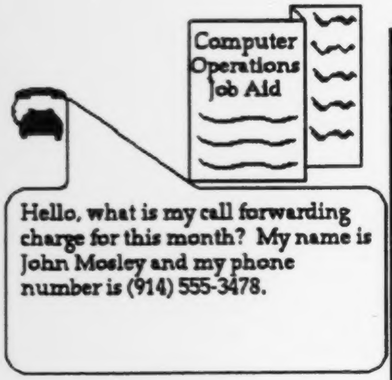
Customer Service System Selection Menu

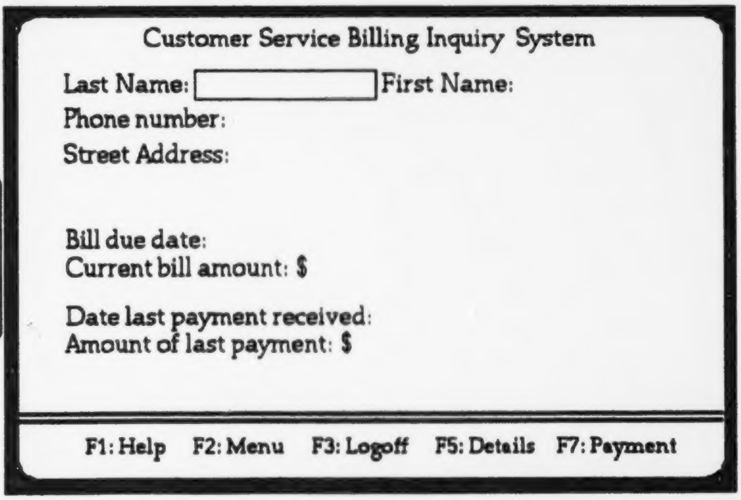
1. Telephone # Lookup
2. Billing
3. Sales

Enter the number of your choice.

F1-Help
F3- Logoff

At this point, the telephone will ring and a customer will request information on a service offered by the company. Here is an example of the types of calls learners may receive.


Computer Operations Job Aid
Hello, what is my call forwarding charge for this month? My name is John Mosley and my phone number is (914) 555-3478.



Customer Service Billing Inquiry System

Last Name: ☐ First Name:
Phone number:
Street Address:

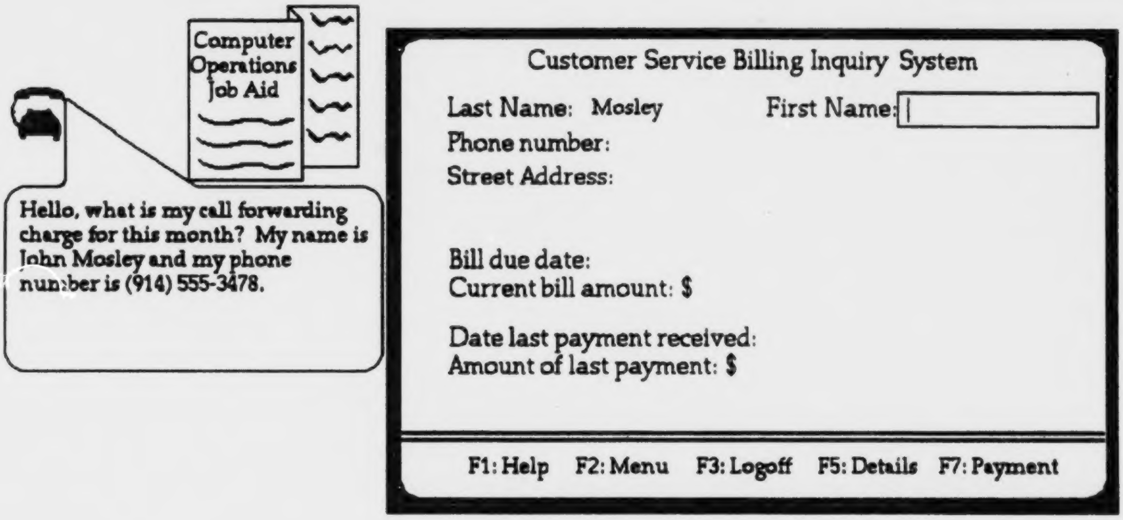
Bill due date:
Current bill amount: $

Date last payment received:
Amount of last payment: $

F1: Help F2: Menu F3: Logoff F5: Details F7: Payment

The learners must enter the caller's name and telephone number at this point. The method of entering information on these simulated computer screens was designed to mimic a typical system. To enter information in a field, learners press the Tab key until the box is around the desired field. Then learners must press Return or Enter to activate that field. When the blinking vertical bar cursor appears, learners can type information into the field. Learners can also use the Shift-Tab key combination to move backwards to the desired field.

When the learners are within a field, the arrow keys or the mouse will move the blinking vertical bar cursor to the desired position. Pressing the Delete or Backspace key will erase the character immediately to the left of the cursor. Pressing Return or Enter tells the computer to evaluate whatever the learners have typed.


Computer Operations Job Aid

Hello, what is my call forwarding charge for this month? My name is John Mosley and my phone number is (914) 555-3478.

Customer Service Billing Inquiry System

Last Name: Mosley
First Name: |
Phone number:
Street Address:

Bill due date:
Current bill amount: $

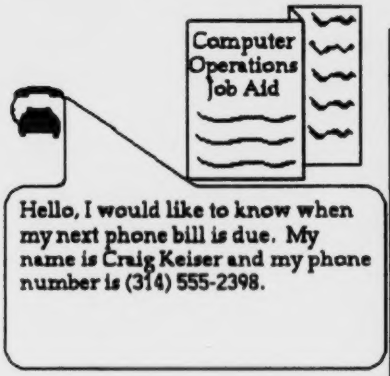
Date last payment received:
Amount of last payment: $

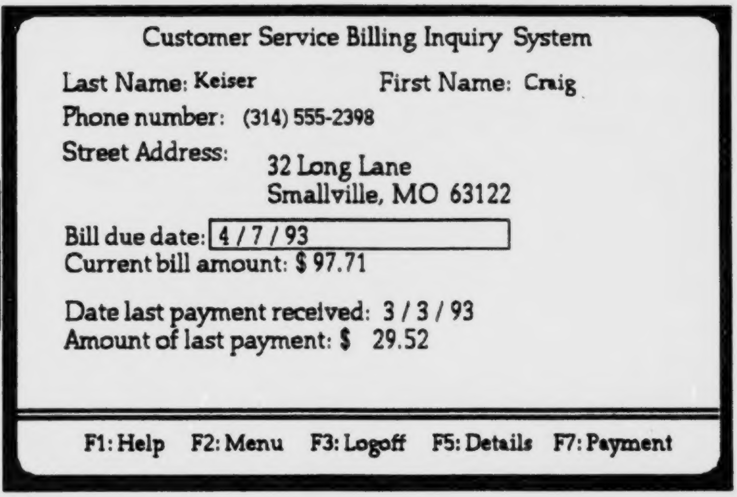
F1: Help F2: Menu F3: Logoff F5: Details F7: Payment

Several metacognitive prompts guide the learners through entering the customer information.

After entering the customer information, the learners must decide whether the information requested is on the current screen or the Details Screen. The correct choice depends on what the customer requests. The learners are guided to the correct choice through metacognitive prompts and questions.

If the learners must use the current screen to provide the requested information, they must move the cursor box (by using the Tab key) to the field containing the answer to the customer's question and press Return or Enter.


Computer Operations Job Aid
Hello, I would like to know when my next phone bill is due. My name is Craig Keiser and my phone number is (314) 555-2398.



Customer Service Billing Inquiry System

Last Name: Keiser First Name: Craig

Phone number: (314) 555-2398

Street Address:
32 Long Lane
Smallville, MO 63122

Bill due date: 4 / 7 / 93

Current bill amount: $ 97.71

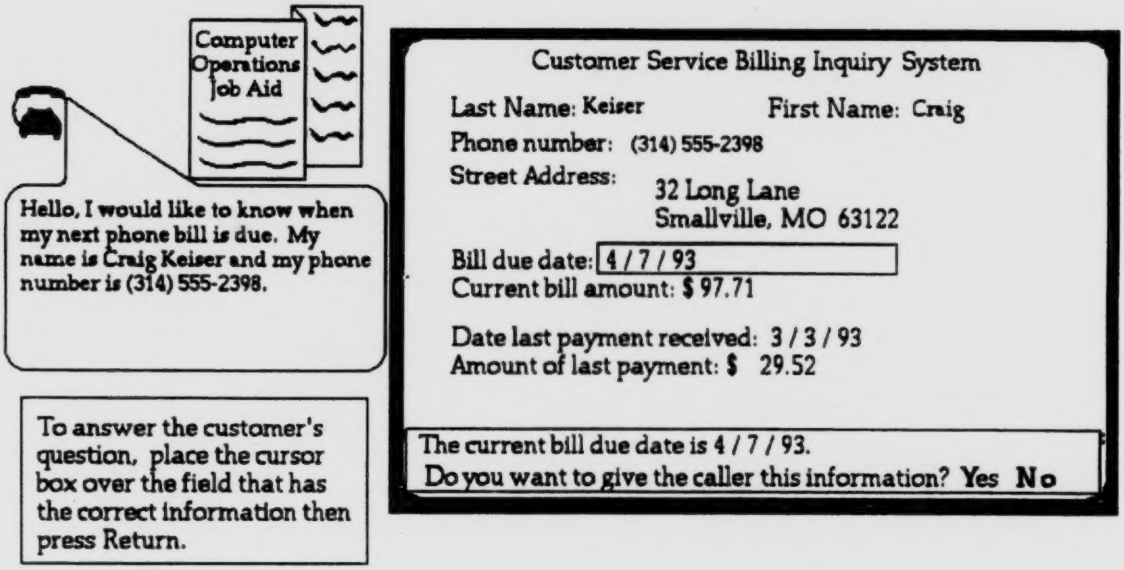
Date last payment received: 3 / 3 / 93

Amount of last payment: $ 29.52

F1: Help F2: Menu F3: Logoff F5: Details F7: Payment

To answer the customer's question, place the cursor box over the field that has the correct information then press Return.

The learners are given a chance to confirm that this information is correct.



Hello, I would like to know when my next phone bill is due. My name is Craig Keiser and my phone number is (314) 555-2398.

To answer the customer's question, place the cursor box over the field that has the correct information then press Return.

Customer Service Billing Inquiry System

Last Name: Keiser First Name: Craig

Phone number: (314) 555-2398

Street Address: 32 Long Lane
Smallville, MO 63122

Bill due date: 4 / 7 / 93

Current bill amount: $ 97.71

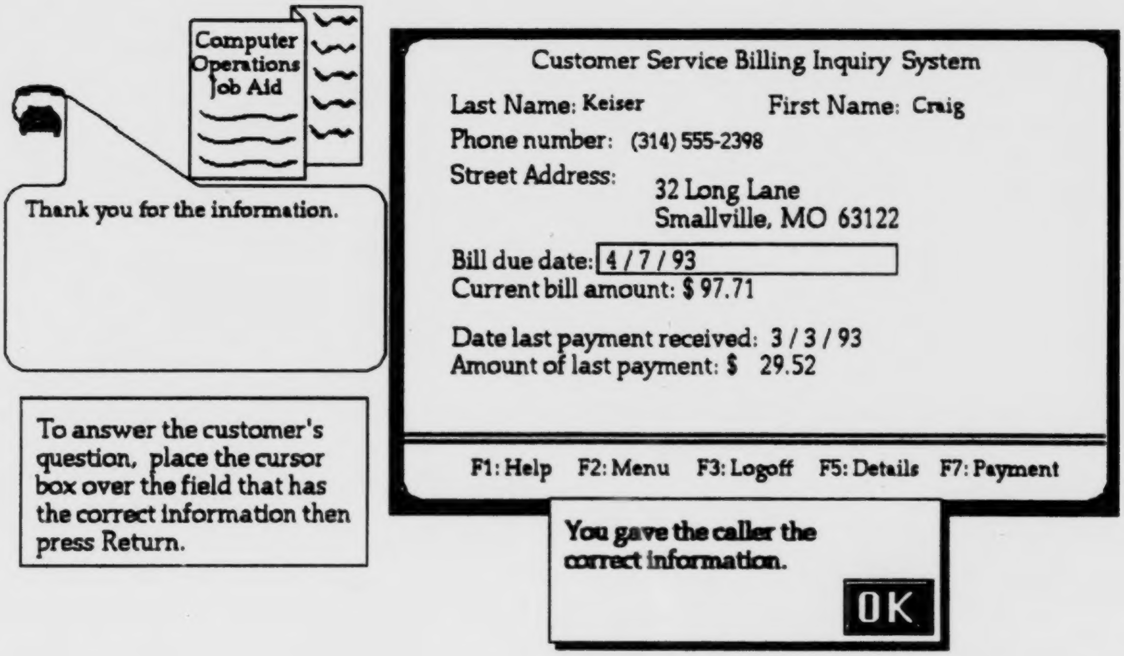
Date last payment received: 3 / 3 / 93

Amount of last payment: $ 29.52

The current bill due date is 4 / 7 / 93.

Do you want to give the caller this information? Yes No

The computer then informs the learners if they completed the task correctly.



Thank you for the information.

To answer the customer's question, place the cursor box over the field that has the correct information then press Return.

Customer Service Billing Inquiry System

Last Name: Keiser First Name: Craig

Phone number: (314) 555-2398

Street Address: 32 Long Lane
Smallville, MO 63122

Bill due date: 4 / 7 / 93

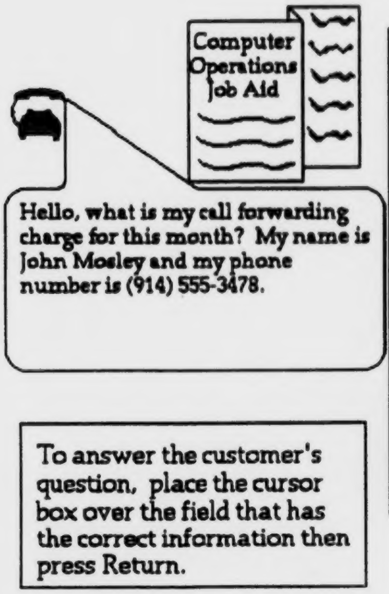
Current bill amount: $ 97.71

Date last payment received: 3 / 3 / 93

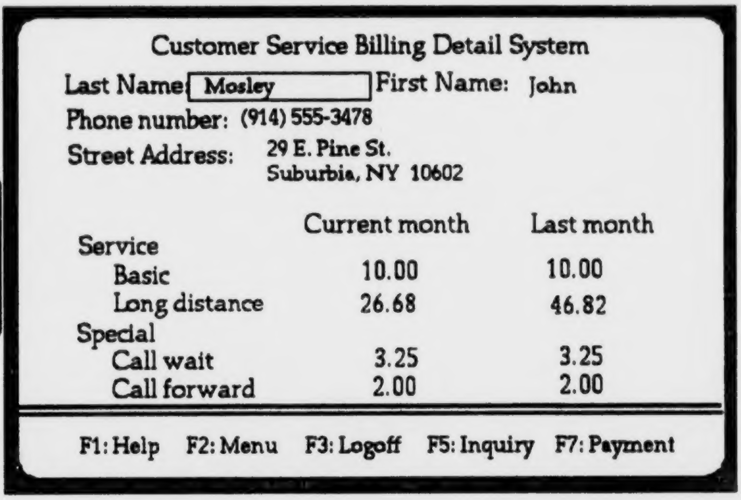
Amount of last payment: $ 29.52

You gave the caller the correct information.

If the learners must go to the Details Screen, the following screen appears. The learners must move the cursor box (by using the Tab key) to the field containing the answer to the customer's question and press Return or Enter.


Computer Operations Job Aid
Hello, what is my call forwarding charge for this month? My name is John Mosley and my phone number is (914) 555-3478.

To answer the customer's question, place the cursor box over the field that has the correct information then press Return.



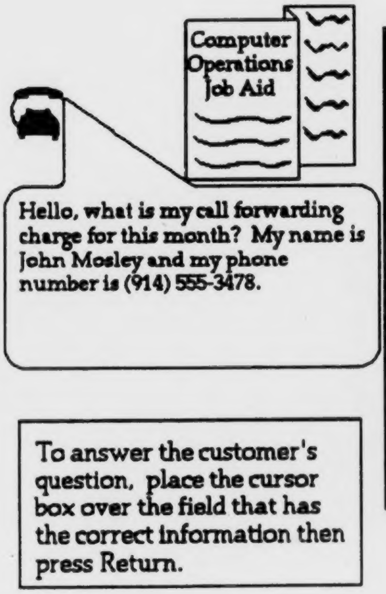
Customer Service Billing Detail System

Last Name: Mosley First Name: John
Phone number: (914) 555-3478
Street Address: 29 E. Pine St.
Suburbia, NY 10602

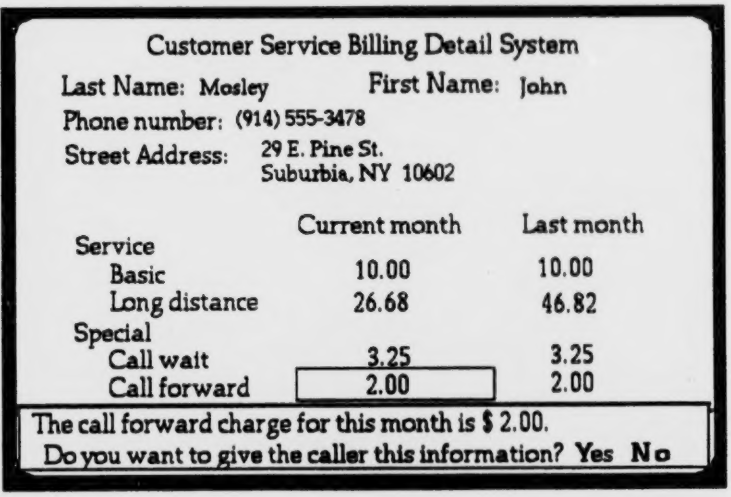
	Current month	Last month
Service		
Basic	10.00	10.00
Long distance	26.68	46.82
Special		
Call wait	3.25	3.25
Call forward	2.00	2.00

F1: Help F2: Menu F3: Logoff F5: Inquiry F7: Payment

The learners are given a chance to verify that this is the correct information to give the customer.


Computer Operations Job Aid
Hello, what is my call forwarding charge for this month? My name is John Mosley and my phone number is (914) 555-3478.

To answer the customer's question, place the cursor box over the field that has the correct information then press Return.



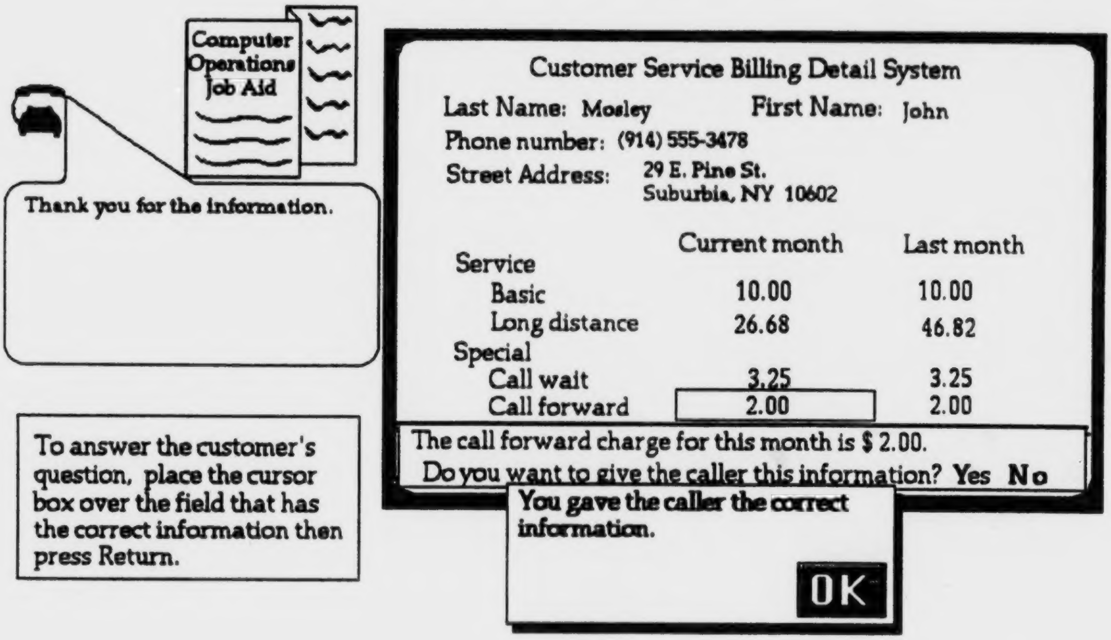
Customer Service Billing Detail System

Last Name: Mosley First Name: John
Phone number: (914) 555-3478
Street Address: 29 E. Pine St.
Suburbia, NY 10602

	Current month	Last month
Service		
Basic	10.00	10.00
Long distance	26.68	46.82
Special		
Call wait	3.25	3.25
Call forward	2.00	2.00

The call forward charge for this month is $ 2.00.
Do you want to give the caller this information? Yes No

The computer then informs the learners if they have completed the task correctly.



Thank you for the information.

To answer the customer's question, place the cursor box over the field that has the correct information then press Return.

Customer Service Billing Detail System

Last Name: Mosley First Name: John

Phone number: (914) 555-3478

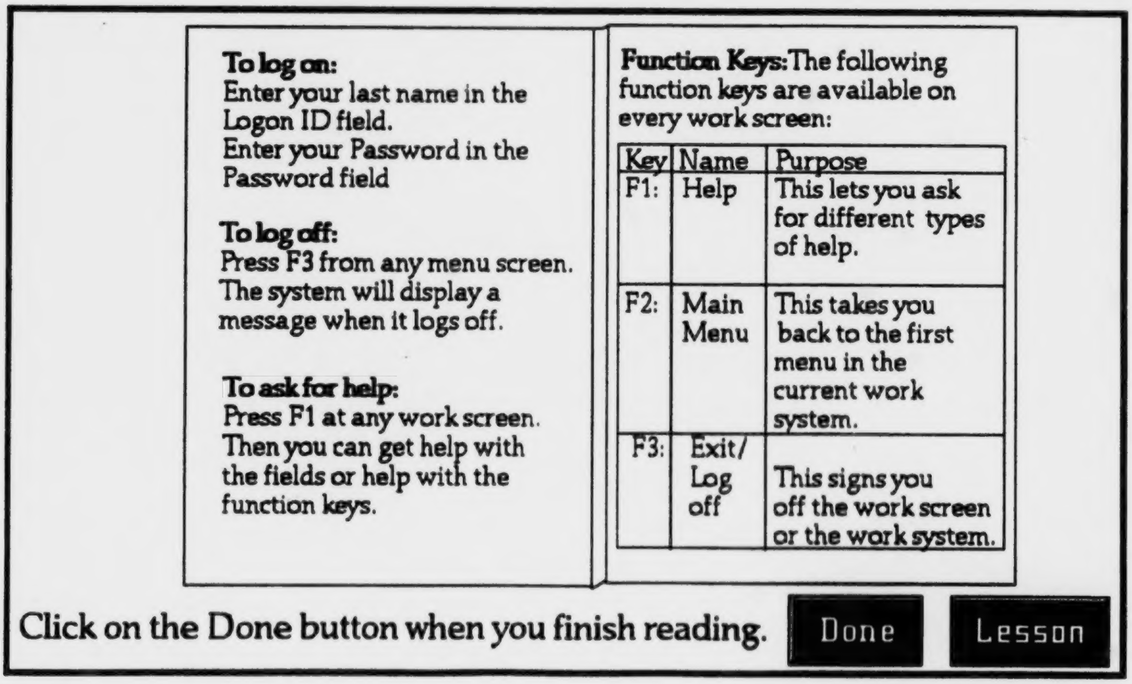
Street Address: 29 E. Pine St.
Suburbia, NY 10602

	Current month	Last month
Service		
Basic	10.00	10.00
Long distance	26.68	46.82
Special		
Call wait	3.25	3.25
Call forward	2.00	2.00

The call forward charge for this month is $ 2.00.
Do you want to give the caller this information? Yes No

You gave the caller the correct information.

Learners may look at a Computer Operations Job Aid at any time. The job aid defines the most common procedures on the computer system.



To log on:
Enter your last name in the Logon ID field.
Enter your Password in the Password field

To log off:
Press F3 from any menu screen. The system will display a message when it logs off.

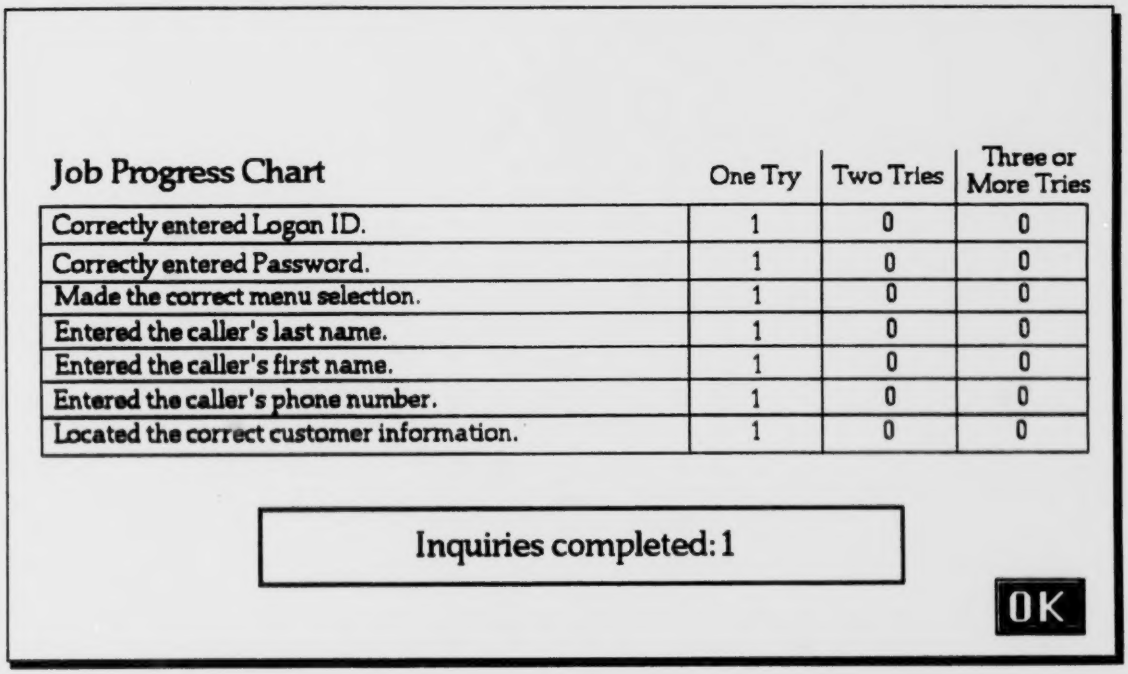
To ask for help:
Press F1 at any work screen. Then you can get help with the fields or help with the function keys.

Function Keys: The following function keys are available on every work screen:

Key	Name	Purpose
F1:	Help	This lets you ask for different types of help.
F2:	Main Menu	This takes you back to the first menu in the current work system.
F3:	Exit/ Log off	This signs you off the work screen or the work system.

Click on the Done button when you finish reading.

The learners then obtain a Job Progress Chart. This chart tells the learners how many tries it took to complete the task correctly. It also indicates how many inquiries have been completed.



Job Progress Chart	One Try	Two Tries	Three or More Tries
Correctly entered Logon ID.	1	0	0
Correctly entered Password.	1	0	0
Made the correct menu selection.	1	0	0
Entered the caller's last name.	1	0	0
Entered the caller's first name.	1	0	0
Entered the caller's phone number.	1	0	0
Located the correct customer information.	1	0	0

Inquiries completed: 1

After the learners click on **OK**, another customer calls and the process starts over until ten calls are completed. A learner's cumulative progress is recorded each time a call is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.

If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 4: Complex Customer Contact—Overview

Prerequisites: Mastery of Module 1: **How to Use This Program**
Completion of Module 2: **Information Sharing—Overview**
Completion of Module 3: **Simple Customer Contact—Overview**

The Complex Customer Contact Module teaches basic skills necessary for individuals who want to become customer service representatives whose job requires complex contact with the customer, including making decisions about customer needs. This module has the following job scenarios:

1. completing a form for a customer
2. selecting a chart for a customer
3. writing a letter to a customer
4. adjusting a customer's bill

The jobs in this module require learners to use information from multiple sources including charts, forms, manuals, and computer screens similar to those they would find on the job. The tasks presented may require the learners to synthesize information from more than one source. The job scenarios are as typical and realistic as possible.

Learners must be ready to take notes when required and should have a supply of paper and pencils handy at all times.

Instructional Aids for the Learner:

Learners will follow a prescribed path to successfully perform the tasks in these scenarios. The learner can obtain help in a variety of ways. If the learner needs help reading a particular item, such as a form, the **Learn About** button will provide a list of lessons available on that item.

If the learner needs help deciding what to do next, the **Job** button provides a list of instructions for completing the job.

If the learner is not sure what help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Refer to Module 1 for more information about these buttons.

Module 4: Forms—Completing a Form

In this scenario, learners look up information on a form. A coworker brings one or more Insurance Claim Forms to the learners. The learners must use the information on these forms to complete an Insurance Claim Summary Form. Here are the objectives of this scenario:

Main objective:

The learner will complete the Insurance Claim Summary Form using the appropriate information from the Insurance Claim Form(s).

Secondary objectives:

- The learner will select the appropriate information from the Insurance Claim Form.
- The learner will make the necessary computations.

These are the basic skills presented in this scenario:

Reading Skills

Read and interpret specific information from written materials.
Read and interpret charts, graphs, tables, and forms.

Writing Skills

Record date, time, and other requested information on work forms.

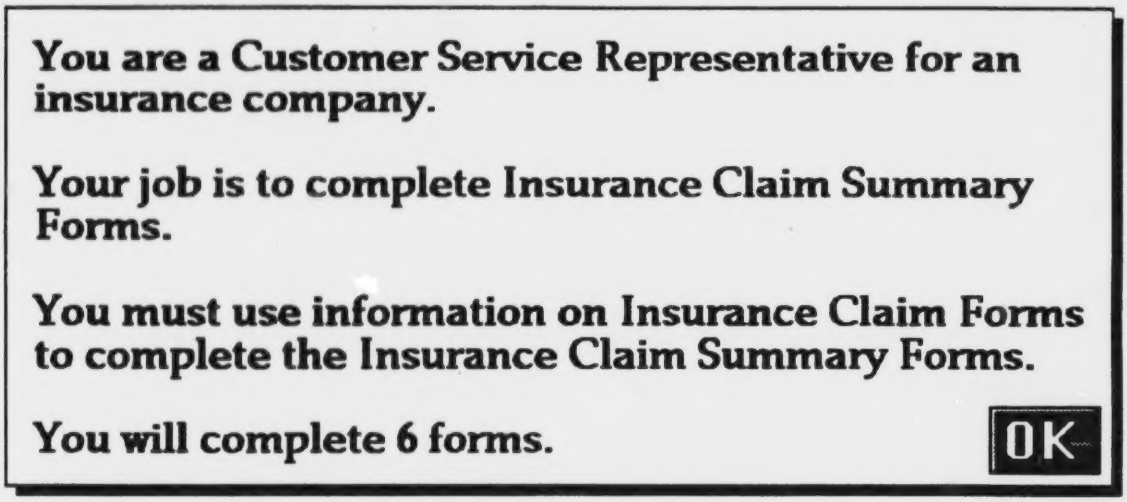
Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

This scenario has the following instructional units:

The Insurance Claim Form:
    What is a Form?
The Insurance Claim Summary Form:
    What is a Form?
    How to Calculate the Amount Insured on the Insurance Claim Summary Form

When the learners enter the scenario, they see this:



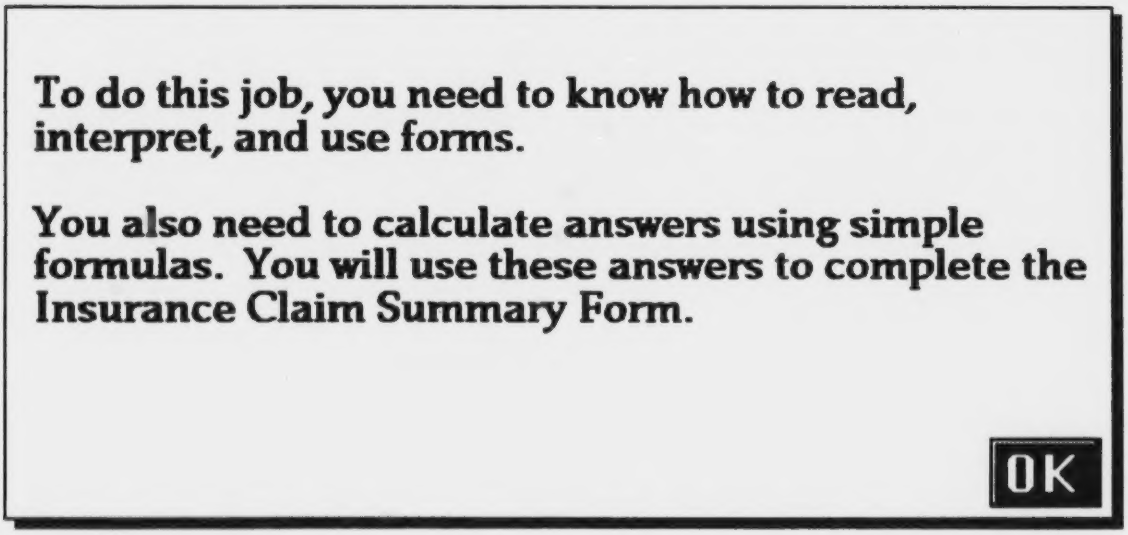
You are a Customer Service Representative for an insurance company.

Your job is to complete Insurance Claim Summary Forms.

You must use information on Insurance Claim Forms to complete the Insurance Claim Summary Forms.

You will complete 6 forms.

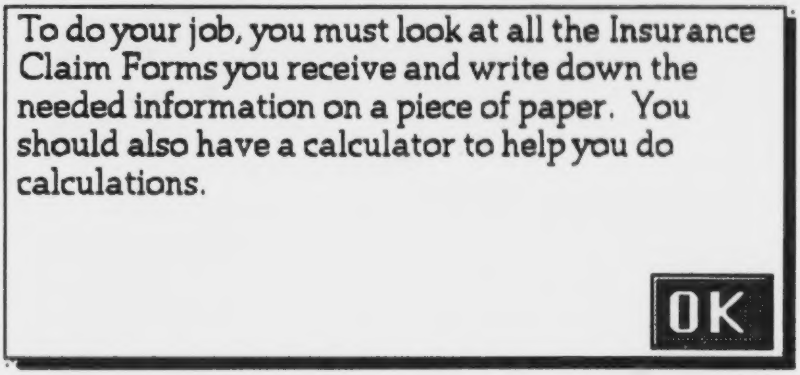
Then they are told the types of skills they will need to complete the scenario.



To do this job, you need to know how to read, interpret, and use forms.

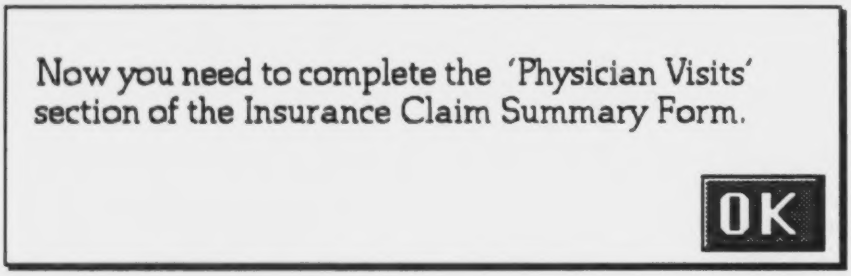
You also need to calculate answers using simple formulas. You will use these answers to complete the Insurance Claim Summary Form.

The scenario begins with an explanation of the task. Learners are also given suggestions for how to complete the task.



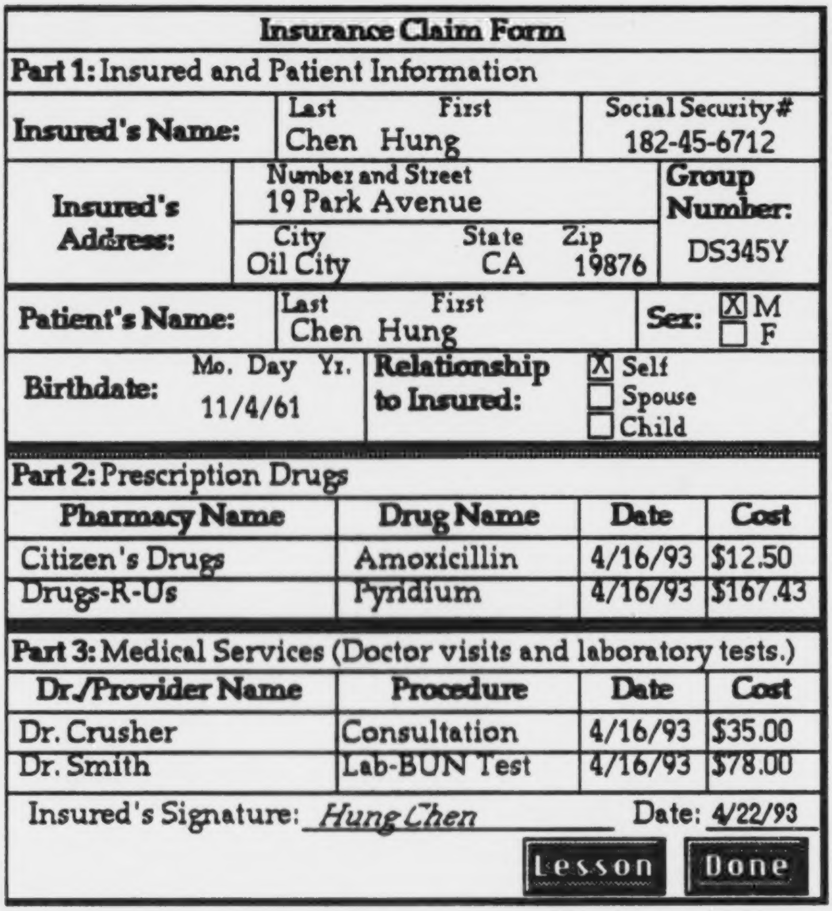
To do your job, you must look at all the Insurance Claim Forms you receive and write down the needed information on a piece of paper. You should also have a calculator to help you do calculations.

At this point, a coworker appears with the forms the learners must summarize. The learners will be guided through completion of the form and prompted to refer to the Insurance Claim Form when necessary.



Now you need to complete the 'Physician Visits' section of the Insurance Claim Summary Form.

To locate the information on an Insurance Claim Form, learners must click on the **Look At** button and then on the form.



Insurance Claim Form

Part 1: Insured and Patient Information

Insured's Name: Last: Chen First: Hung Social Security #: 182-45-6712

Insured's Address: Number and Street: 19 Park Avenue

City: Oil City State: CA Zip: 19876

Group Number: DS345Y

Patient's Name: Last: Chen First: Hung **Sex:** ☒ M ☐ F

Birthdate: Mo. Day Yr. 11/4/61 **Relationship to Insured:** ☒ Self ☐ Spouse ☐ Child

Part 2: Prescription Drugs

Pharmacy Name	Drug Name	Date	Cost
Citizen's Drugs	Amoxicillin	4/16/93	$12.50
Drugs-R-Us	Pyridium	4/16/93	$167.43

Part 3: Medical Services (Doctor visits and laboratory tests.)

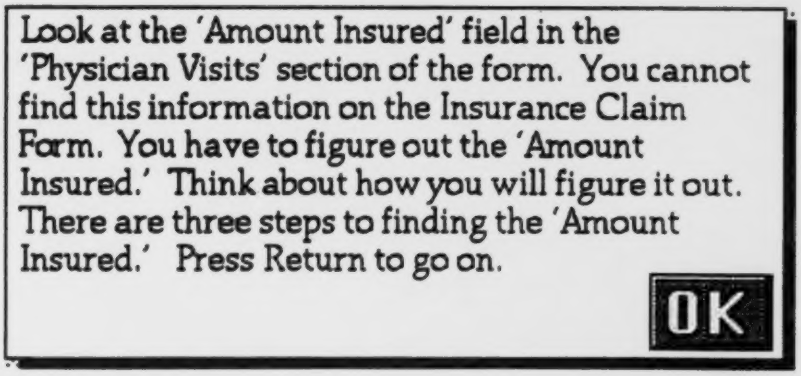
Dr./Provider Name	Procedure	Date	Cost
Dr. Crusher	Consultation	4/16/93	$35.00
Dr. Smith	Lab-BUN Test	4/16/93	$78.00

Insured's Signature: *Hung Chen* Date: 4/22/93

After reading the information on the form, learners can either request a lesson on the form or go on. To go on, learners click on the **Done** button.

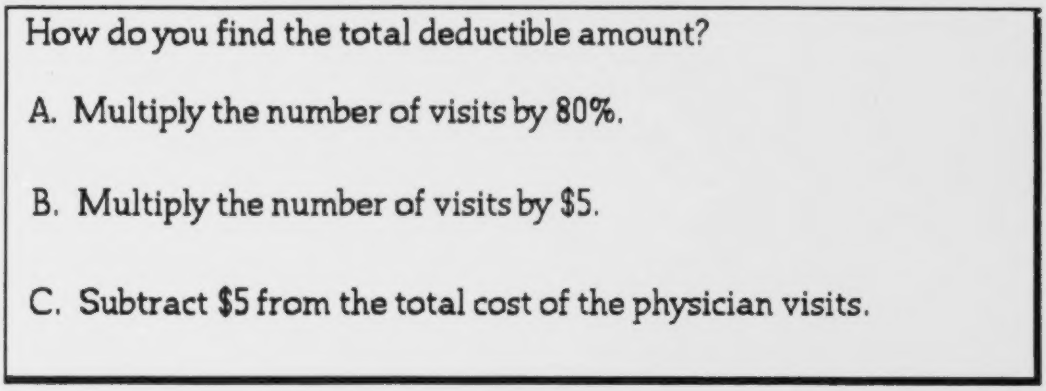
Prompts asking learners to complete fields on the form are presented as appropriate.

Additional prompts are given when the learners need to perform an arithmetic task.



Look at the 'Amount Insured' field in the 'Physician Visits' section of the form. You cannot find this information on the Insurance Claim Form. You have to figure out the 'Amount Insured.' Think about how you will figure it out. There are three steps to finding the 'Amount Insured.' Press Return to go on.

Before completing the task, learners are asked questions concerning how the task is completed.



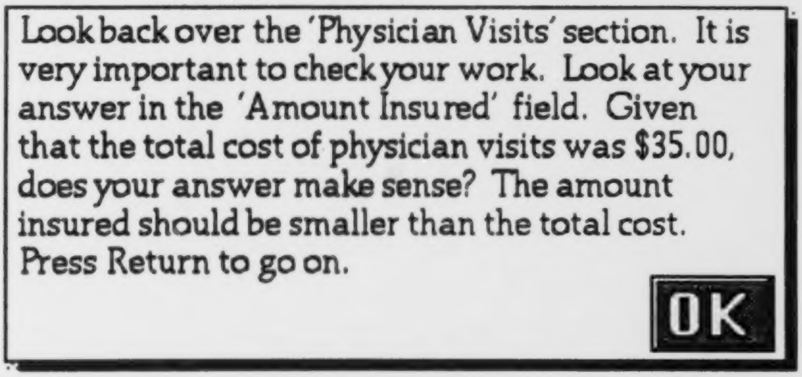
How do you find the total deductible amount?

A. Multiply the number of visits by 80%.

B. Multiply the number of visits by $5.

C. Subtract $5 from the total cost of the physician visits.

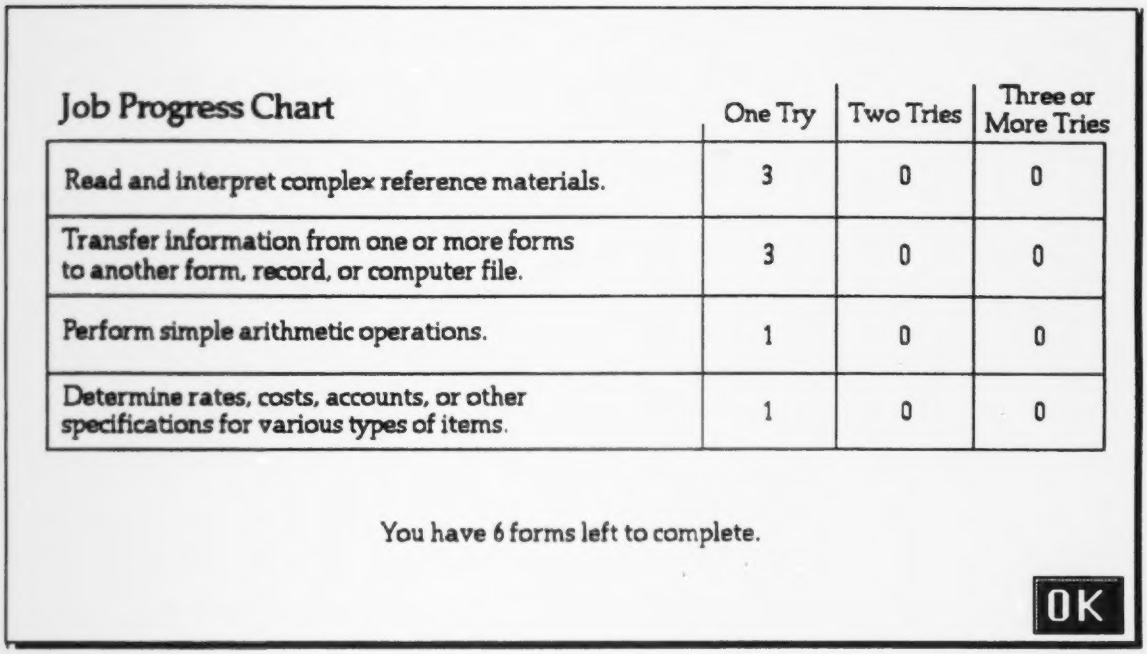
Finally, with the arithmetic tasks, learners are given some guidelines on how to determine if the given answer is reasonable.



Look back over the 'Physician Visits' section. It is very important to check your work. Look at your answer in the 'Amount Insured' field. Given that the total cost of physician visits was $35.00, does your answer make sense? The amount insured should be smaller than the total cost. Press Return to go on.

If learners need to complete other sections of the form at this time, the above process is repeated.

When the form is complete, learners receive a Job Progress Chart on their performance.



Job Progress Chart	One Try	Two Tries	Three or More Tries
Read and interpret complex reference materials.	3	0	0
Transfer information from one or more forms to another form, record, or computer file.	3	0	0
Perform simple arithmetic operations.	1	0	0
Determine rates, costs, accounts, or other specifications for various types of items.	1	0	0

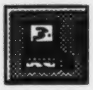
You have 6 forms left to complete.

After clicking **OK**, learners will receive another form until six forms are completed. A learner's cumulative progress is recorded each time a form is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.



If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 4: Charts—Make a Chart

In this scenario, learners create a bar chart for the product inquiries and sales for the month. The learners must locate the correct information on tally sheets and then create the bars on the bar chart. The learners then answer questions using the bar chart and a pie chart. Here are the objectives of this scenario:

Main objective:

The learner will create a bar chart based on product sales and inquiries and then use the bar chart and a pie chart to answer questions.

Secondary objectives:

- The learner will count the number of tallies for the given week for inquiries or for sales.
- The learner will select the appropriate position on the bar chart to record the inquiries or sales for a given week.
- The learner will select the appropriate height on the bar chart to record the inquiries or sales for a given week.

These are the basic skills presented in this scenario:

Reading Skills

Read and interpret specific information from written materials.
Read and interpret charts, graphs, tables, and forms.

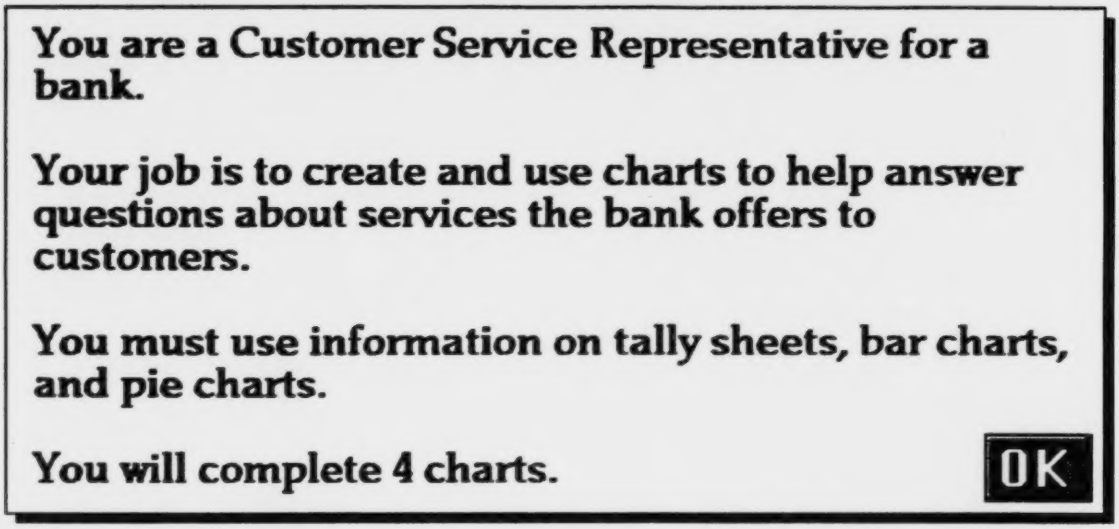
Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

This scenario has the following instructional units:

The Tally Sheet:
    What is a Chart?
The Inquiries/Sales Bar Chart:
    What is a Bar Chart?
    How to Make a Bar Chart.
The Sales Pie Chart:
    What is a Pie Chart?

When the learners enter the scenario, they see this:



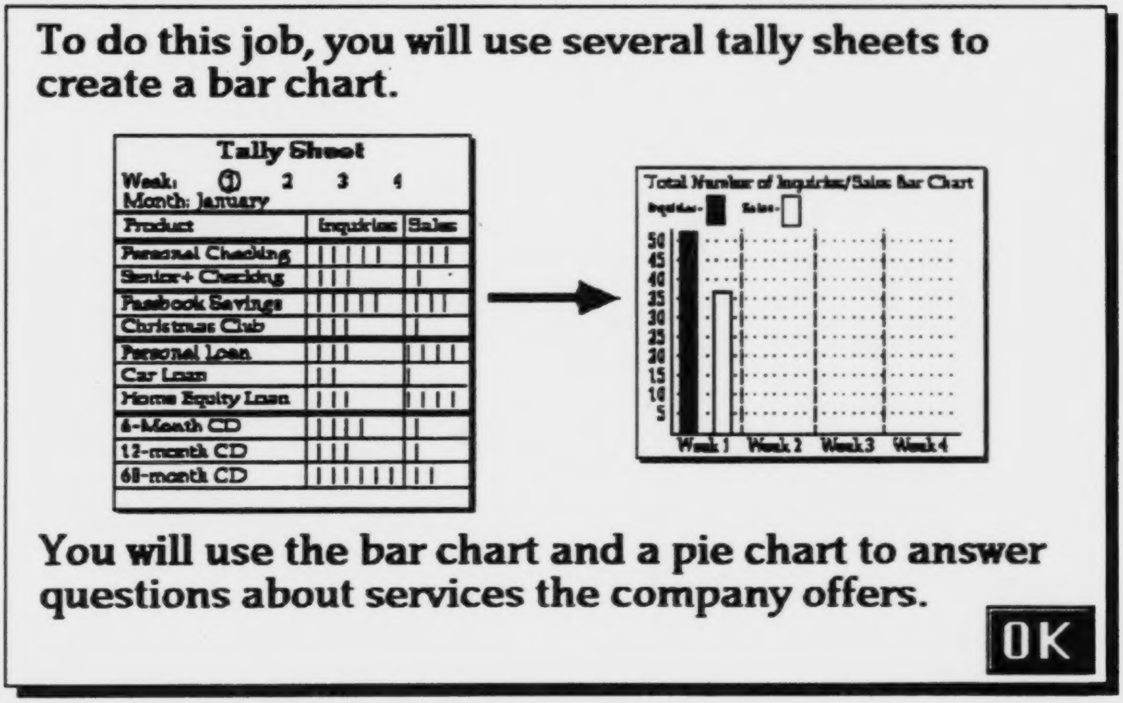
You are a Customer Service Representative for a bank.

Your job is to create and use charts to help answer questions about services the bank offers to customers.

You must use information on tally sheets, bar charts, and pie charts.

You will complete 4 charts.

Then they are told the types of skills they will need to complete the scenario.



To do this job, you will use several tally sheets to create a bar chart.

Tally Sheet

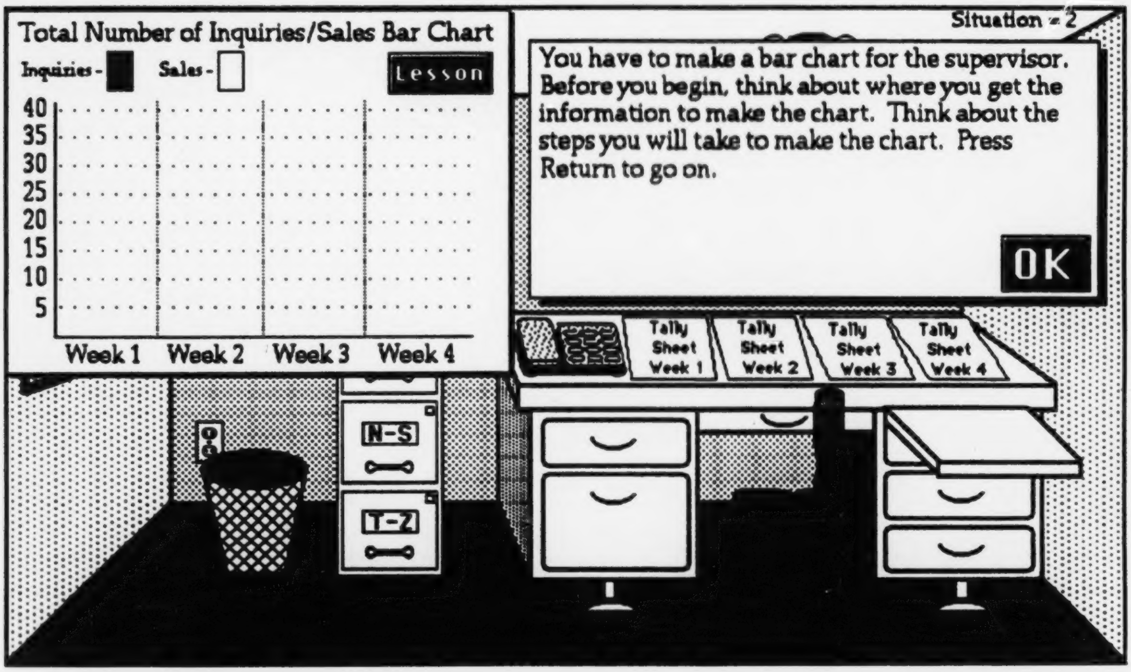
Week: [✓ 1] 2 3 4
Month: January

Product	Inquiries	Sales
Personal Checking	||||||	||||
Senior+ Checking	|||	|
Passbook Savings	||||||	||||
Christmas Club	|||	|
Personal Loan	|||	||||
Car Loan	||	|
Home Equity Loan	|||	||||
6-Month CD	||||	|
12-month CD	|||	|
60-month CD	|||||||	||

Total Number of Inquiries/Sales Bar Chart
Inquiries - ■
Sales - □
50
45
40
35
30
25
20
15
10
5
Week 1
Week 2
Week 3
Week 4

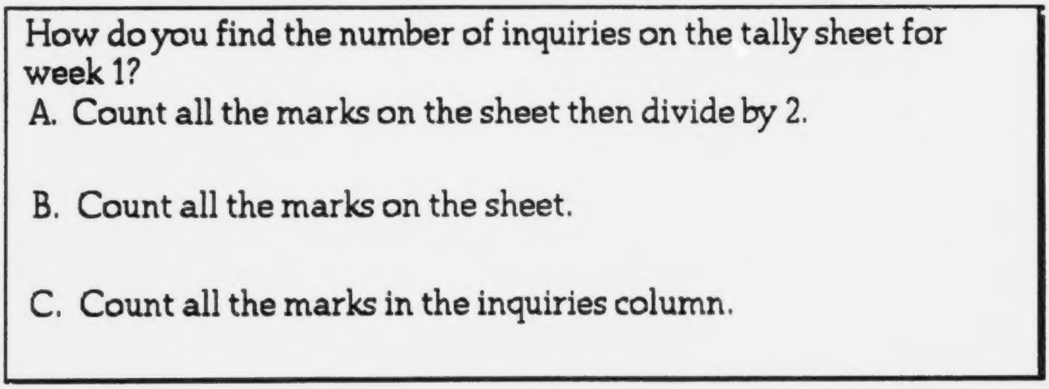
You will use the bar chart and a pie chart to answer questions about services the company offers.

At this point, a coworker will appear and drop off tally sheets for product sales and inquiries. The learners will be told to complete the bar chart for sales and inquiries. The learners will complete four bar charts for information.


Total Number of Inquiries/Sales Bar Chart
Inquiries - ■
Sales - ☐
Lesson
40
35
30
25
20
15
10
5
Week 1
Week 2
Week 3
Week 4
Situation = 2
OK
Tally Sheet Week 1
Tally Sheet Week 2
Tally Sheet Week 3
Tally Sheet Week 4
N-S
T-Z

You have to make a bar chart for the supervisor. Before you begin, think about where you get the information to make the chart. Think about the steps you will take to make the chart. Press Return to go on.

For the first bar chart, the learners are walked through the process with several questions designed to help the learners understand the process for creating bar charts. These prompts are gradually removed as the instruction continues.



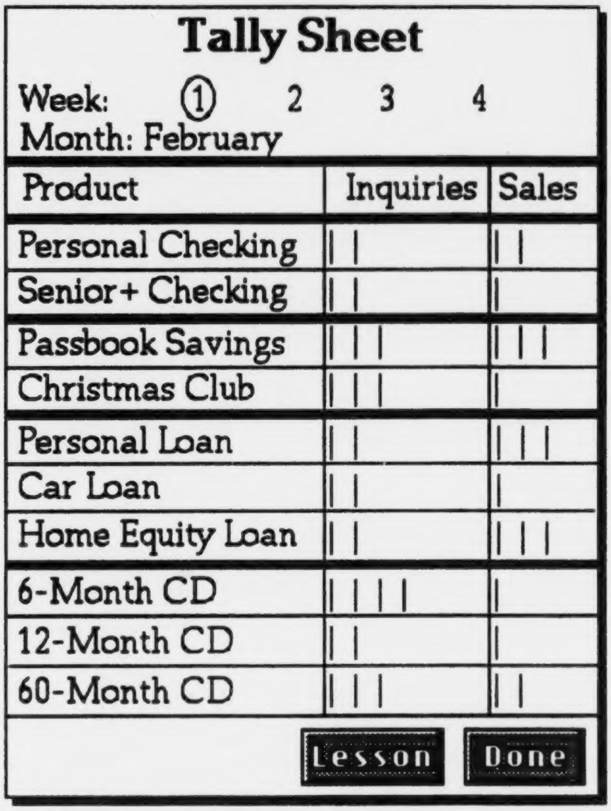
How do you find the number of inquiries on the tally sheet for week 1?

A. Count all the marks on the sheet then divide by 2.

B. Count all the marks on the sheet.

C. Count all the marks in the inquiries column.

The learners must look at the Tally Sheet to find the number of inquiries or sales. To do this, the learners must click on the **Look At** button and then on the Tally Sheet.

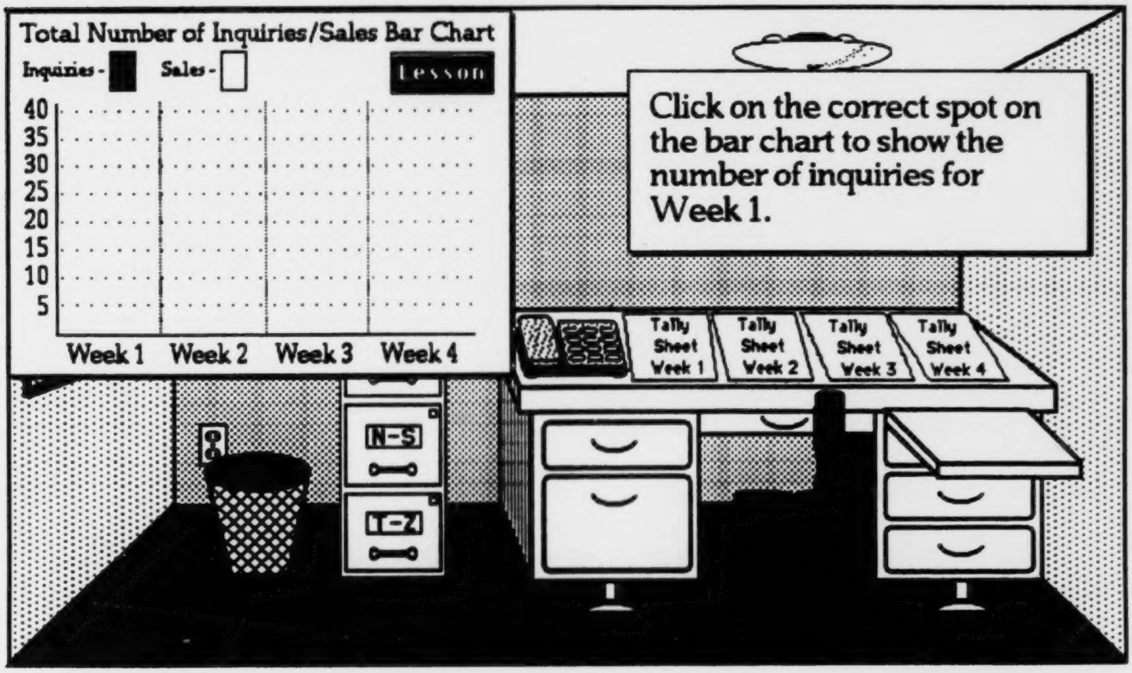


Tally Sheet

Week: [✓ 1] 2 3 4
Month: February

Product	Inquiries	Sales
Personal Checking	│ │	│ │
Senior+ Checking	│ │	│
Passbook Savings	│ │ │	│ │ │
Christmas Club	│ │ │	│
Personal Loan	│ │	│ │ │
Car Loan	│ │	│
Home Equity Loan	│ │	│ │ │
6-Month CD	│ │ │ │	│
12-Month CD	│ │	│
60-Month CD	│ │ │	│ │

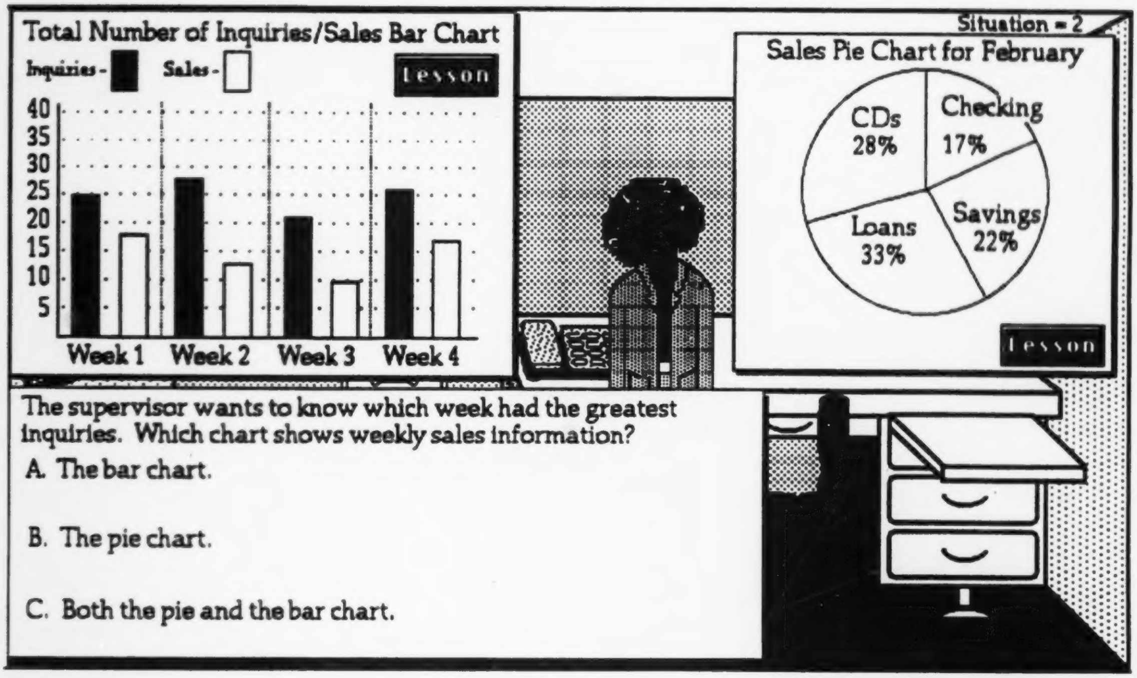
The learners must click on the appropriate place on the bar chart to show how high the bar should be.


Total Number of Inquiries/Sales Bar Chart
Inquiries - ■
Sales - ☐
Lesson
40
35
30
25
20
15
10
5
Week 1
Week 2
Week 3
Week 4
Tally Sheet Week 1
Tally Sheet Week 2
Tally Sheet Week 3
Tally Sheet Week 4
N-S
T-Z

Click on the correct spot on the bar chart to show the number of inquiries for Week 1.

Learners follow a similar process for all four weeks. After completing the bar chart, a coworker brings in a pie chart comparing sales of products.

A supervisor then asks the learners some questions concerning the information on these charts.



Total Number of Inquiries/Sales Bar Chart
Inquiries - ■
Sales - ☐
Lesson
40
35
30
25
20
15
10
5
Week 1
Week 2
Week 3
Week 4
Situation = 2
Sales Pie Chart for February
CDs 28%
Checking 17%
Savings 22%
Loans 33%
Lesson

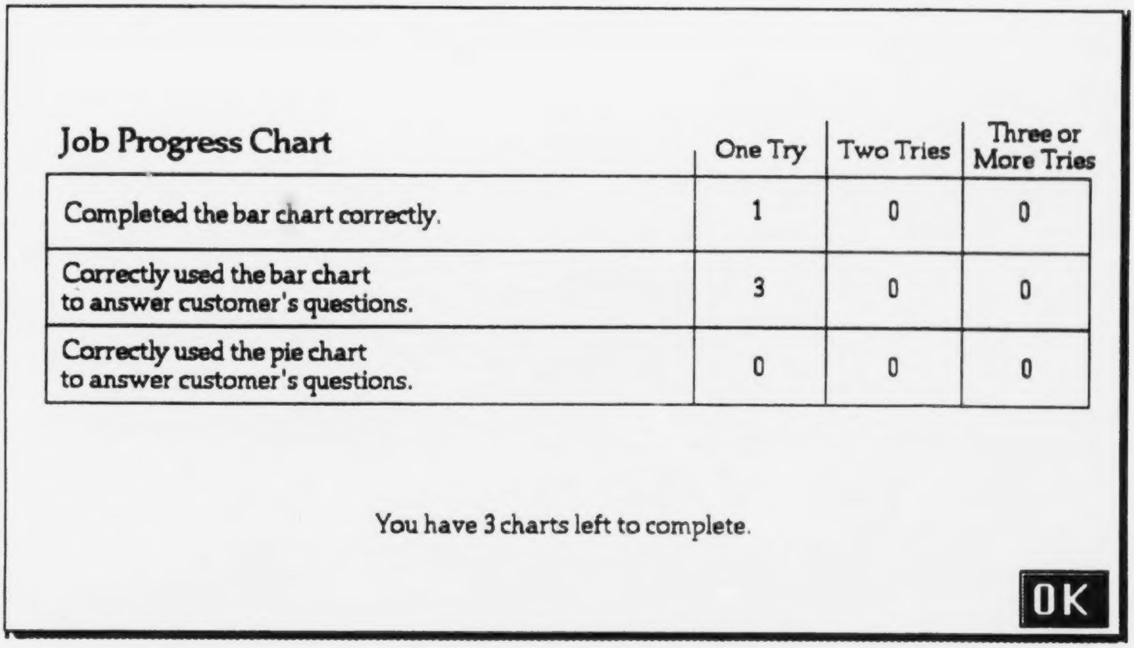
The supervisor wants to know which week had the greatest inquiries. Which chart shows weekly sales information?

A. The bar chart.

B. The pie chart.

C. Both the pie and the bar chart.

After answering all of the questions, the learners receive a Job Progress Chart containing feedback on their performance.



Job Progress Chart

	One Try	Two Tries	Three or More Tries
Completed the bar chart correctly.	1	0	0
Correctly used the bar chart to answer customer's questions.	3	0	0
Correctly used the pie chart to answer customer's questions.	0	0	0

You have 3 charts left to complete.

After clicking **OK**, the learners will receive another call until four charts are created. A learner's cumulative progress is recorded each time a chart is completed.

Instructional Aids for Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.

If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 4: Manuals—Writing a Letter to a Customer

In this scenario, learners write a letter to a customer that describes the actions a customer must take to solve a billing problem. Learners receive a Problem Inquiry Form outlining the problem and then must locate the correct solution in the Customer Service Manual. Here are the objectives of this scenario:

Main objective:

The learner will write a problem/solution letter to a customer using a Problem Inquiry Form previously completed by the customer, a Customer Service Manual, and a job aid as a reference tool.

Secondary objectives:

- The learner will compare information on the Problem Inquiry Form and in the Customer Service Manual.
- The learner will determine which solution is correct.
- The learner will write a letter to the customer describing a solution to the problem.
- The learner will complete the letter in a timely manner.

These are the basic skills presented in this scenario:

Reading Skills

Read and interpret forms.
Use reference materials in manuals and forms.
Read and interpret specific information in manuals and forms.
Read and interpret sequential directions in manuals.
Use table of contents, index, and appendices in manuals.

Writing Skills

Utilize appropriate mechanics of standard English.
Write letters using correct structure and sentence style.
Write information in a clear, logical, and complete manner.
Use a computer for simple word processing.

Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, memos, job aids.

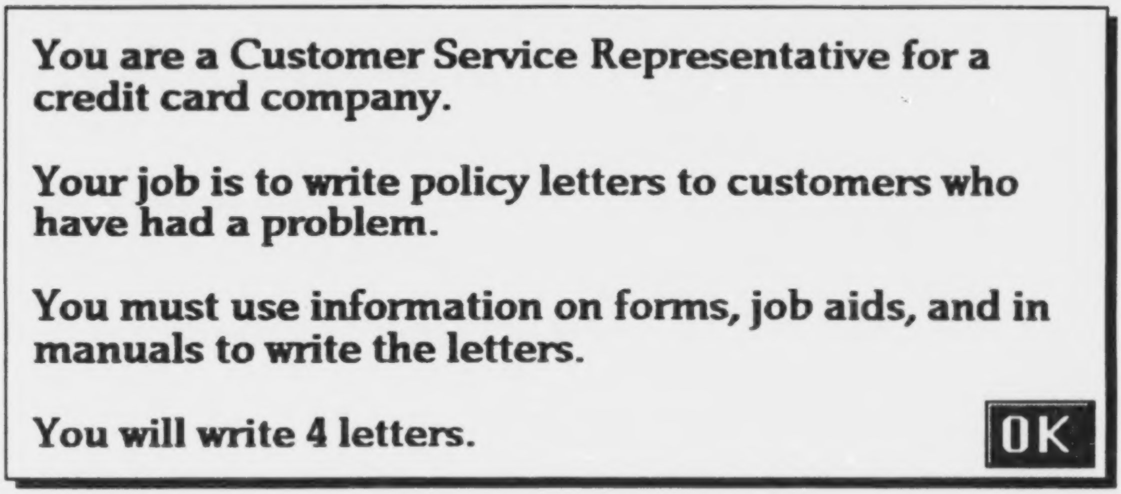
Critical Thinking and Problem-Solving Skills

Demonstrate ability to differentiate, sort, and classify information.
Identify effective problem-solving strategies such as formulating, evaluating, and choosing solutions.

This scenario has the following instructional units:

The Customer Service Manual:
  What is a Manual?
  How to Use the Table of Contents.
  How to Use an Index.
  How to Use Headings.
  How to Follow a Procedure.
The Problem Inquiry Form:
  What is a Form?
  How to Look Up Information on a Form.
Writing the Problem/Solution Letter:
  What is a Letter?
  How to Write a Paragraph.
The Problem/Solution Letter Job Aid:
  What is a Job Aid?

When the learners enter the scenario, they see this:



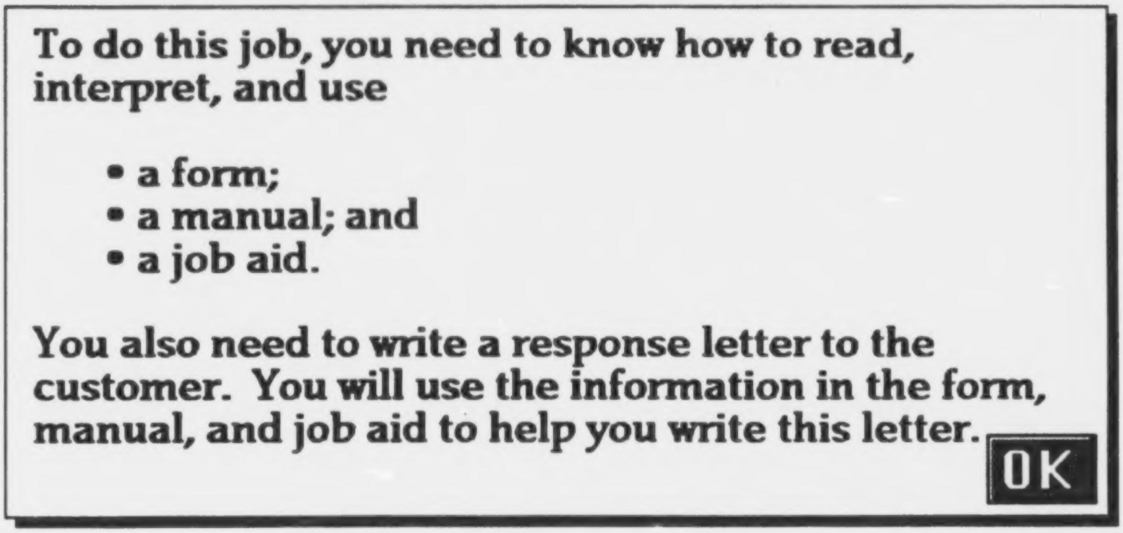
You are a Customer Service Representative for a credit card company.

Your job is to write policy letters to customers who have had a problem.

You must use information on forms, job aids, and in manuals to write the letters.

You will write 4 letters.

Then they are told the types of skills they need to complete the scenario.

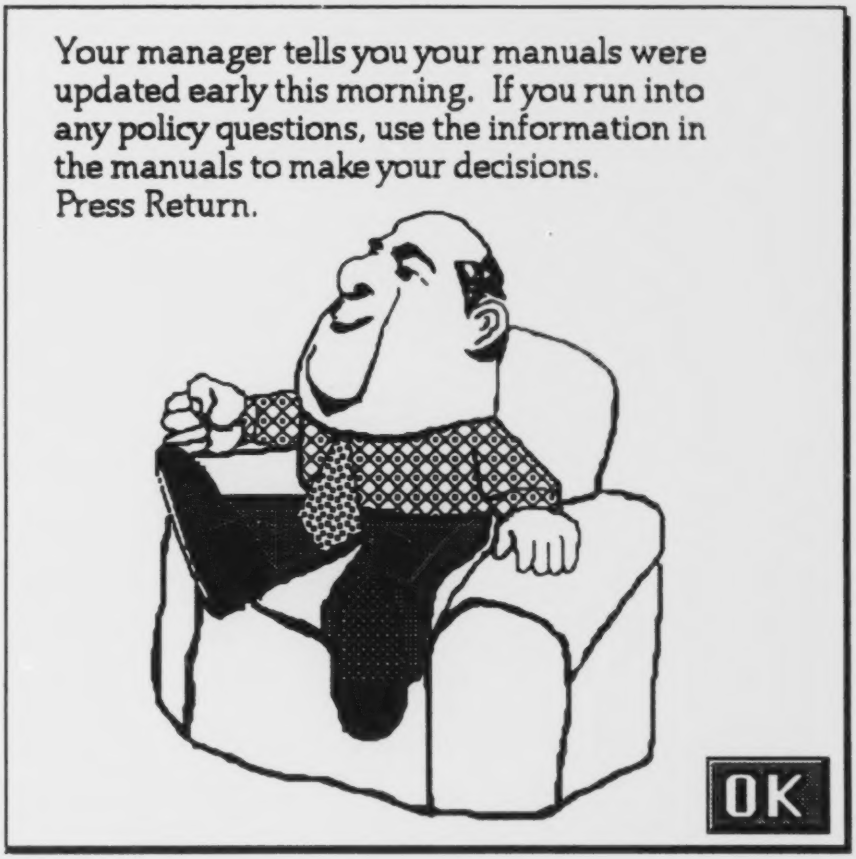


To do this job, you need to know how to read, interpret, and use

- **a form;**
- **a manual; and**
- **a job aid.**

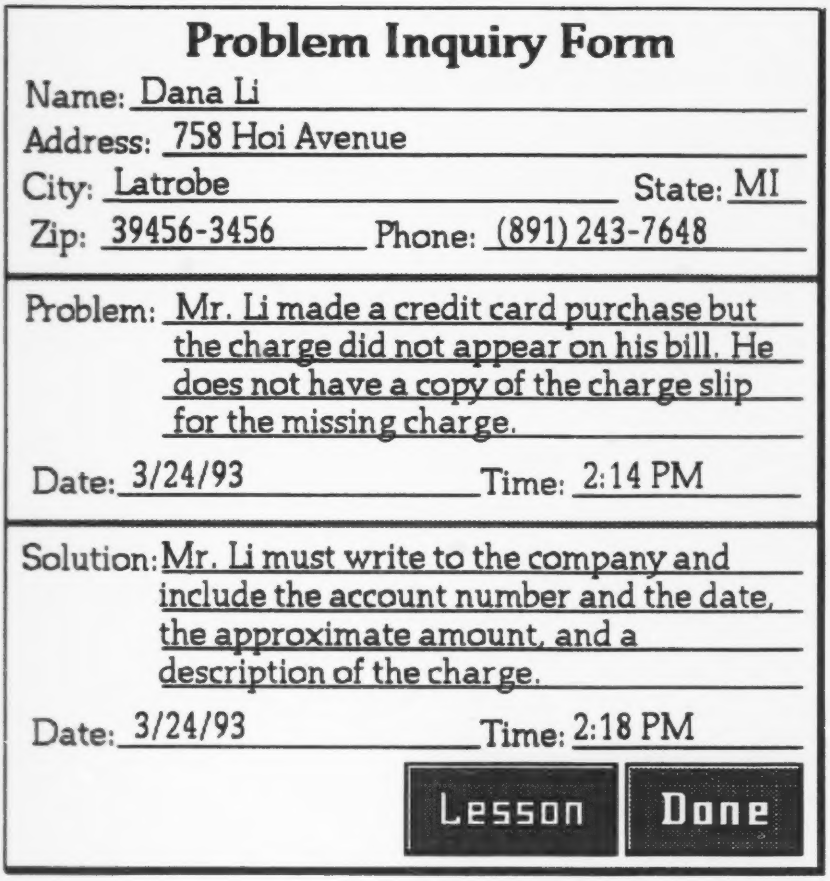
You also need to write a response letter to the customer. You will use the information in the form, manual, and job aid to help you write this letter.

The learners are told that their manuals were updated and they should refer to the manuals in order to use the correct information.



Your manager tells you your manuals were updated early this morning. If you run into any policy questions, use the information in the manuals to make your decisions.
Press Return.

At this point, someone walks into the office and places a Problem Inquiry Form on the desk. The learners will be prompted to look at the form. To do this, learners click on the **Look At** button and then on the form. The learners are then asked several questions in preparation for writing a letter to the customer explaining the solution. The learners will write four letters.



Problem Inquiry Form

Name: Dana Li

Address: 758 Hoi Avenue

City: Latrobe State: MI

Zip: 39456-3456 Phone: (891) 243-7648

Problem: Mr. Li made a credit card purchase but the charge did not appear on his bill. He does not have a copy of the charge slip for the missing charge.

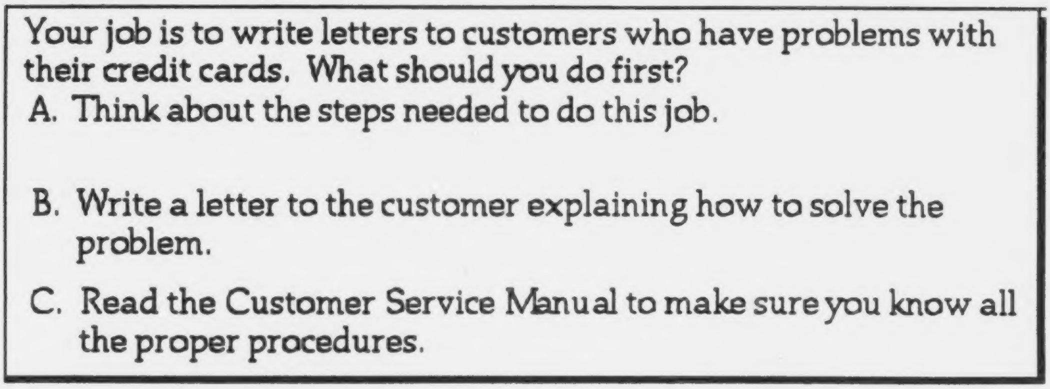
Date: 3/24/93 Time: 2:14 PM

Solution: Mr. Li must write to the company and include the account number and the date, the approximate amount, and a description of the charge.

Date: 3/24/93 Time: 2:18 PM

The learners need to read the form. A lesson on the form can be requested by clicking on the **Lesson** button. The learners click on the **Done** button when they understand the form.

The computer then asks a series of metacognitive questions to make sure that learners understand the problem.

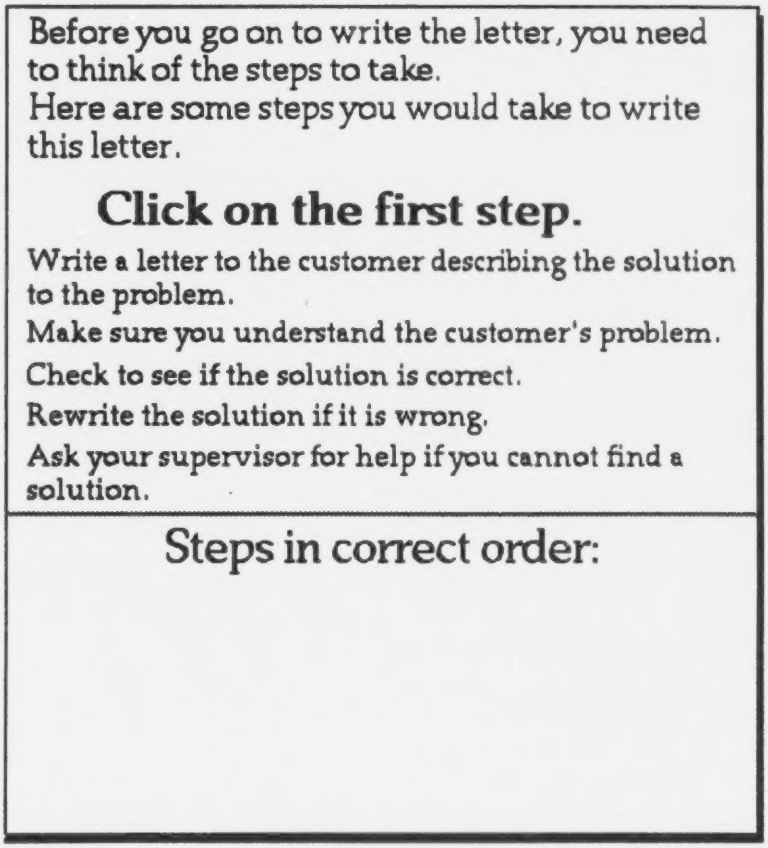


Your job is to write letters to customers who have problems with their credit cards. What should you do first?

A. Think about the steps needed to do this job.

B. Write a letter to the customer explaining how to solve the problem.

C. Read the Customer Service Manual to make sure you know all the proper procedures.



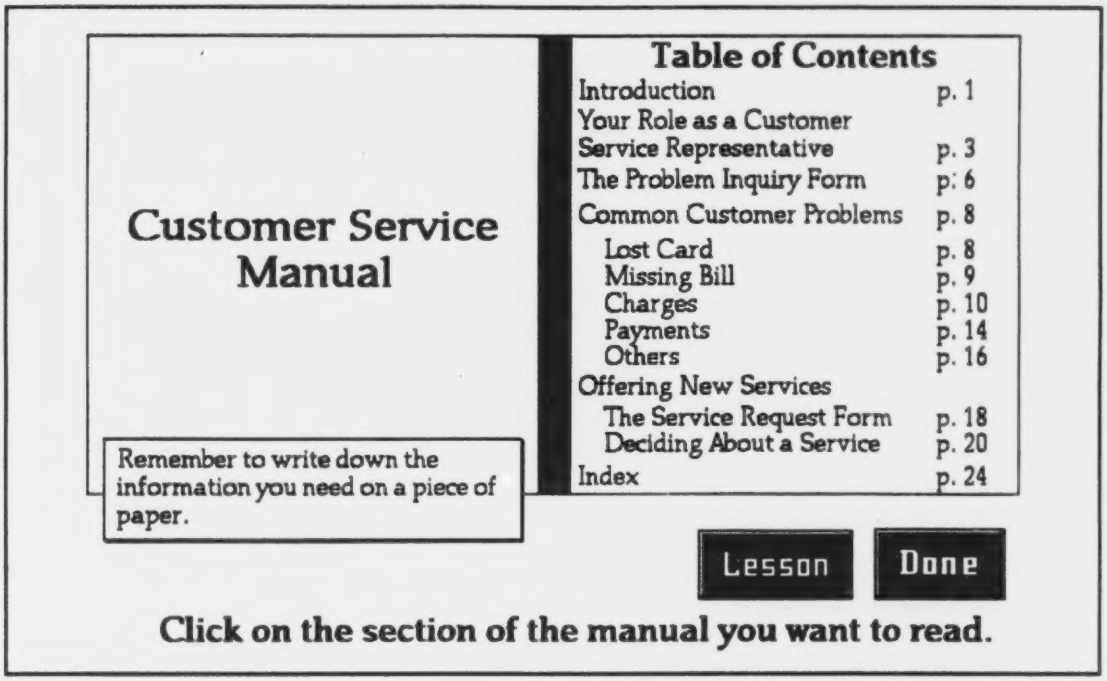
Before you go on to write the letter, you need to think of the steps to take.
Here are some steps you would take to write this letter.

Click on the first step.

Write a letter to the customer describing the solution to the problem.
Make sure you understand the customer's problem.
Check to see if the solution is correct.
Rewrite the solution if it is wrong.
Ask your supervisor for help if you cannot find a solution.

Steps in correct order:

The learners are asked to think about how to write the letter and are also asked several questions about their understanding of the problem. Then the learners are prompted to look at the solution to the problem in the Customer Service Manual. To do this, they click on the **Look At** button and then on the Customer Service Manual.



Customer Service Manual

Table of Contents

Introduction	p. 1
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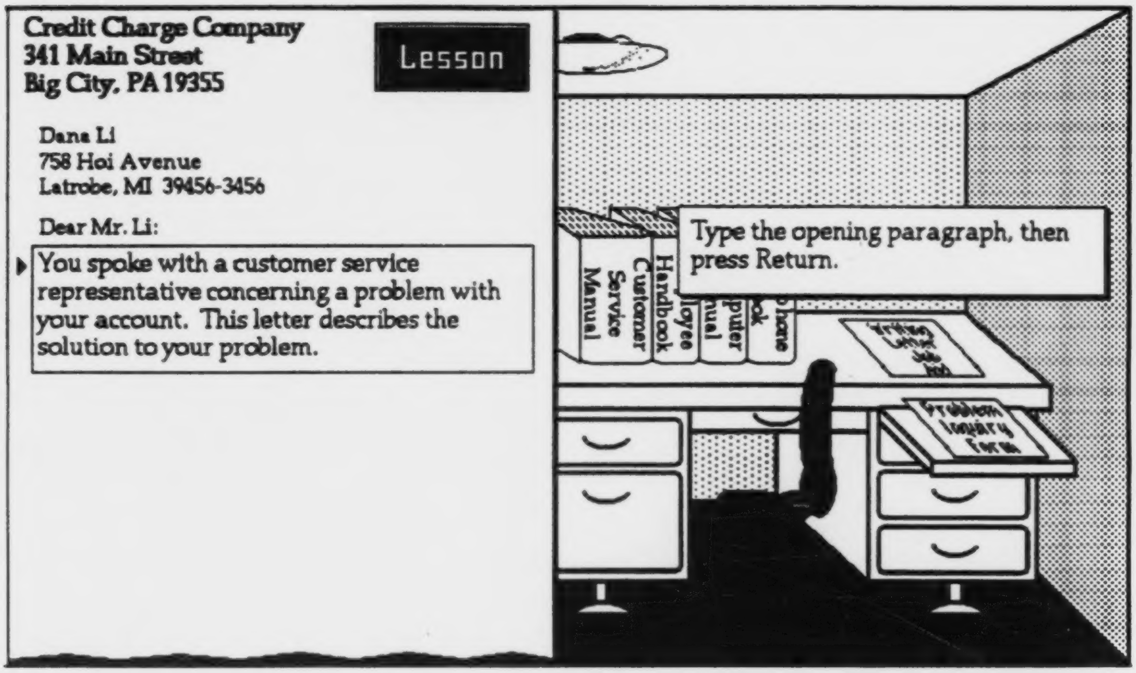
Common Customer Problems	p. 8
Lost Card	p. 8
Missing Bill	p. 9
Charges	p. 10
Payments	p. 14
Others	p. 16
Offering New Services	
The Service Request Form	p. 18
Deciding About a Service	p. 20
Index	p. 24

Remember to write down the information you need on a piece of paper.

Click on the section of the manual you want to read.

At this point the learners need to find the correct place in the manual to find the solution. They can click on a section of the Table of Contents or go to the Index and select a topic there. The computer will prompt them as necessary. **When the learners find the solution, they should write it down on a piece of paper.** The learners then click on the **Done** button, are asked a few more questions, and are then prompted to write the letter.



Credit Charge Company
341 Main Street
Big City, PA 19355

Dana Li
758 Hoi Avenue
Latrobe, MI 39456-3456

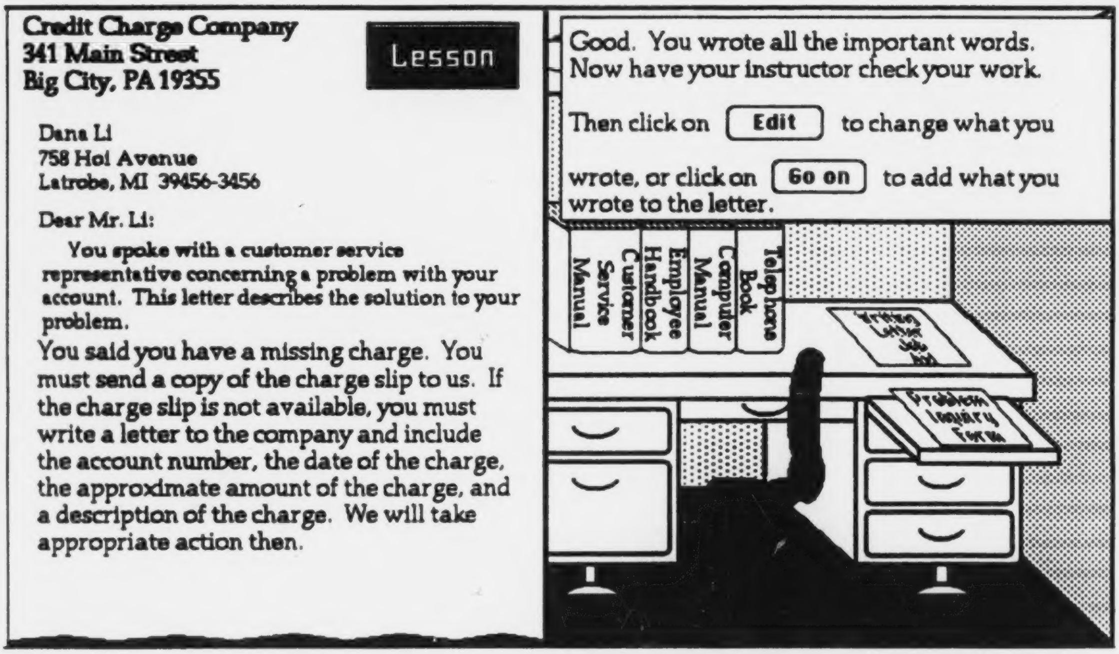
Dear Mr. Li:

You spoke with a customer service representative concerning a problem with your account. This letter describes the solution to your problem.

Type the opening paragraph, then press Return.

Lesson
Service Manual
Customer Handbook
Writing Letter Job Aid
Problem Inquiry Form

The computer takes the learners through the letter writing process step-by-step. The learners are prompted to look at the Problem Inquiry Form and the Writing a Letter Job Aid at appropriate times. At certain points in the process, only key words in the learner's response can be evaluated. The learners are told to get the instructor to check the response for correct grammar and punctuation. The instructor should provide guidance to learners with minimal writing skills.



Credit Charge Company
341 Main Street
Big City, PA 19355

Dana Li
758 Hoi Avenue
Latrobe, MI 39456-3456

Dear Mr. Li:

You spoke with a customer service representative concerning a problem with your account. This letter describes the solution to your problem.

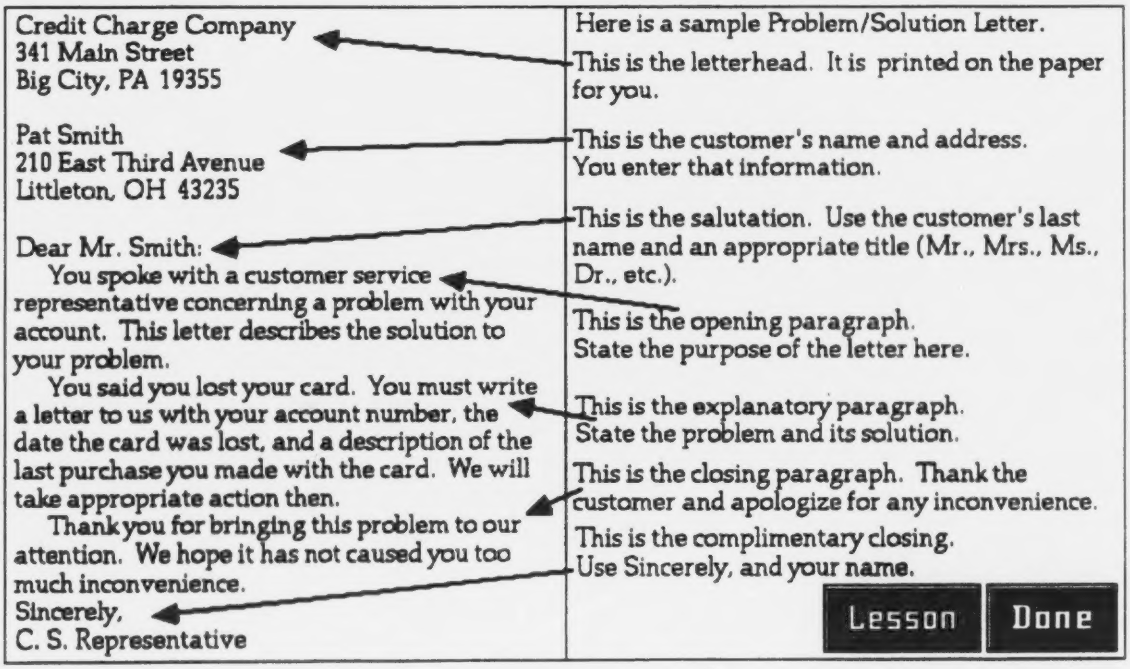
You said you have a missing charge. You must send a copy of the charge slip to us. If the charge slip is not available, you must write a letter to the company and include the account number, the date of the charge, the approximate amount of the charge, and a description of the charge. We will take appropriate action then.

Good. You wrote all the important words. Now have your instructor check your work.

Then click on Edit to change what you wrote, or click on Go on to add what you wrote to the letter.

If the learners are having a hard time writing the letter, they automatically receive lessons that teach them how to write the letter.

Learners can look at Writing a Letter Job Aid at any time. The job aid defines the key aspects of the problem/solution letter. A **Lesson** button on the job aid provides lessons on this particular job aid, and job aids in general.



Credit Charge Company
341 Main Street
Big City, PA 19355

Pat Smith
210 East Third Avenue
Littleton, OH 43235

Dear Mr. Smith:

You spoke with a customer service representative concerning a problem with your account. This letter describes the solution to your problem.

You said you lost your card. You must write a letter to us with your account number, the date the card was lost, and a description of the last purchase you made with the card. We will take appropriate action then.

Thank you for bringing this problem to our attention. We hope it has not caused you too much inconvenience.

Sincerely,
C. S. Representative

Here is a sample Problem/Solution Letter.

This is the letterhead. It is printed on the paper for you.

This is the customer's name and address. You enter that information.

This is the salutation. Use the customer's last name and an appropriate title (Mr., Mrs., Ms., Dr., etc.).

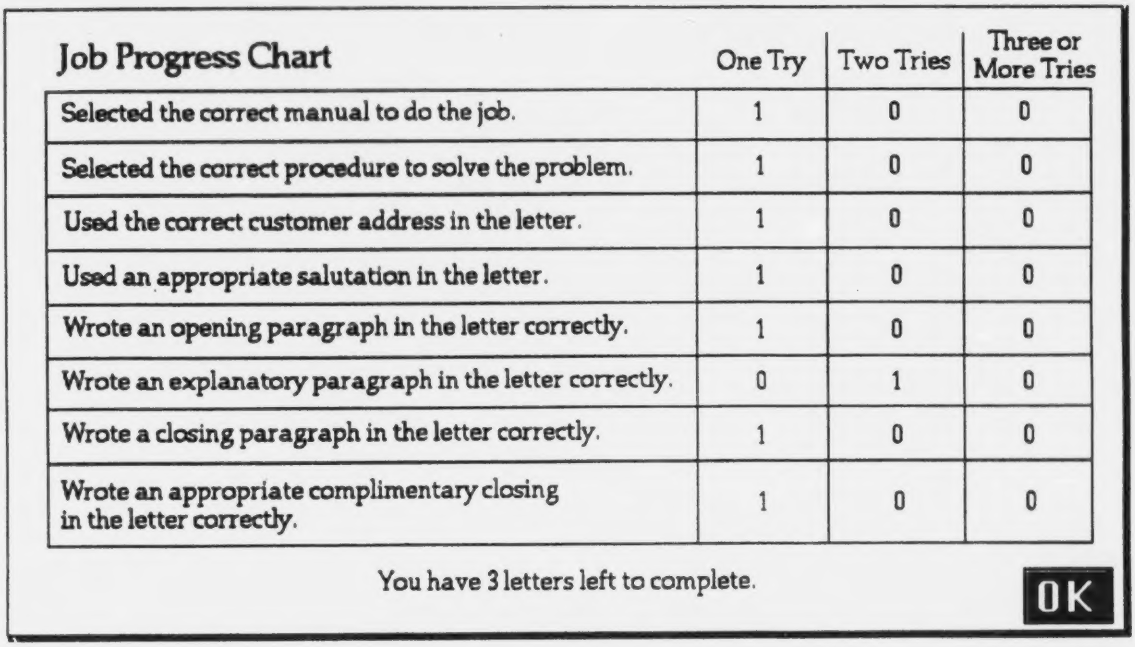
This is the opening paragraph. State the purpose of the letter here.

This is the explanatory paragraph. State the problem and its solution.

This is the closing paragraph. Thank the customer and apologize for any inconvenience.

This is the complimentary closing. Use Sincerely, and your name.

After completing the letter, the learners are asked a few more questions on what to do with the letter. The learners then receive a Job Progress Chart.



Job Progress Chart	One Try	Two Tries	Three or More Tries
Selected the correct manual to do the job.	1	0	0
Selected the correct procedure to solve the problem.	1	0	0
Used the correct customer address in the letter.	1	0	0
Used an appropriate salutation in the letter.	1	0	0
Wrote an opening paragraph in the letter correctly.	1	0	0
Wrote an explanatory paragraph in the letter correctly.	0	1	0
Wrote a closing paragraph in the letter correctly.	1	0	0
Wrote an appropriate complimentary closing in the letter correctly.	1	0	0

You have 3 letters left to complete.

The learners will receive another Problem Inquiry Form until four letters are written. A learner's cumulative progress is recorded each time a letter is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.

If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 4: Computers—Assisting a Customer with a Billing Adjustment

In this scenario, learners work with the customer to correct a billing problem by using a computer system. A customer calls the learners with a specific problem about their telephone bill. The learners must determine the correct solution by using a computer billing system and reading the available reference materials. Here are the objectives of this scenario:

Main objective:

The learner will take the appropriate action based on information given by and obtained from the customer and the computer system.

Secondary objectives:

- The learner will log on and log off of the computer.
- The learner will ask the customer for information needed.
- The learner will complete the computer screen with information obtained from the customer.
- The learner will make decisions about what information is needed based on the computer screen information.
- The learner will use the appropriate F-keys based on the computer screen instructions.
- The learner will select the appropriate solution to the problem or refer the customer to another person.
- The learner will complete the call in a timely manner.

These are the basic skills presented in this scenario:

Reading Skills

Utilize reference materials in vocational texts.

Read and interpret sequential directions in textbooks, manuals, and handouts.

Read directions and interpret basic computer materials, e.g., printouts, software programs, etc.

Writing Skills

Record date, time, and other requested information on work forms.

Organizational and Learning Skills

Use note-taking skills for remembering important information.

Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.

Use resources to seek information, e.g., labels, manuals, job aids.

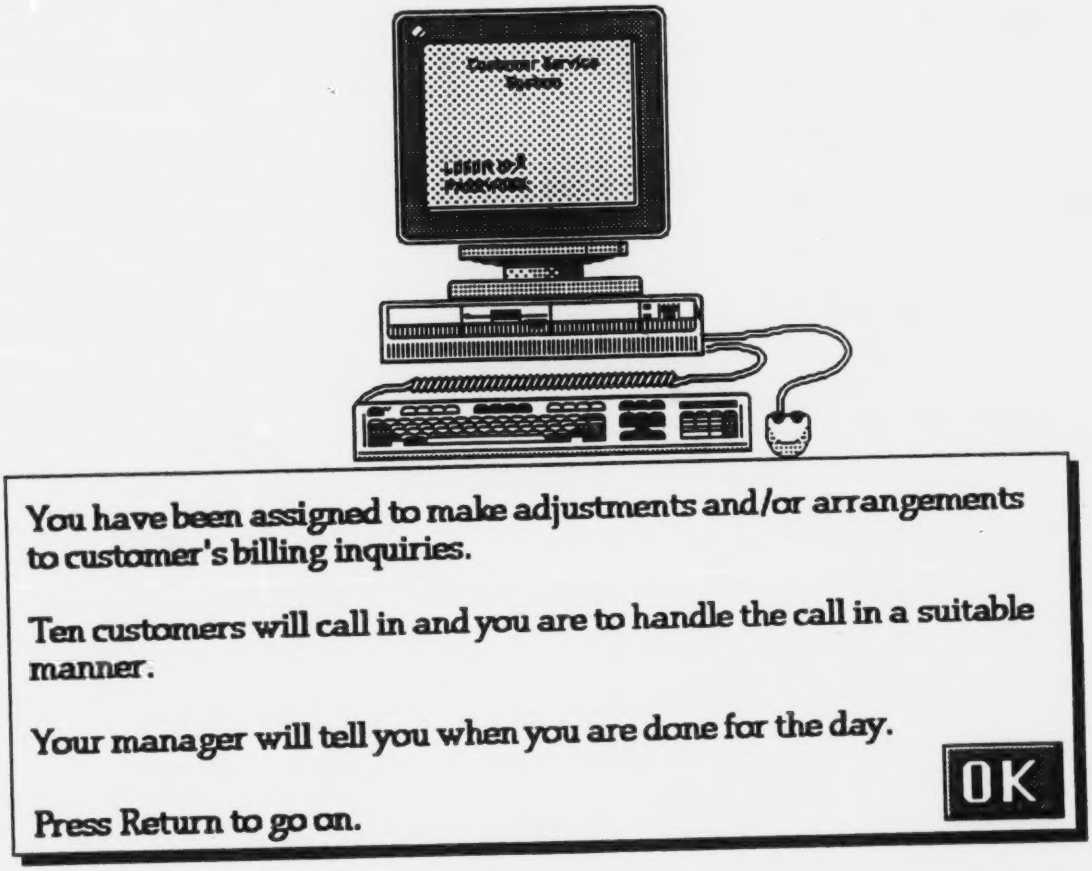
Critical Thinking and Problem-Solving Skills

Identify effective problem-solving strategies such as formulating, evaluating, and choosing solutions.

This scenario includes the following instructional units:

- The Computer Operations Job Aid:
  - What is a Job Aid?
- The Logon Screen:
  - What are Computer Screen Fields?
  - What are Computer Messages?
  - How to Ask for Help.
  - How to Enter Information.
- The Customer Service Selection Menu:
  - What are Computer Screen Fields?
  - What are Computer Messages?
  - How to Ask for Help.
- The Billing Inquiry Screen:
  - What are Computer Screen Fields?
  - What are Function Keys?
  - What are Computer Messages?
  - How to Enter Information.
  - How to Ask for Help.
- The Billing Details Screen:
  - What are Computer Screen Fields?
  - What are Function Keys?
  - What are Computer Messages?
  - How to Enter Information.
  - How to Ask for Help.
- The Billing Adjustment Screen:
  - What are Computer Screen Fields?
  - What are Function Keys?
  - What are Computer Messages?
  - How to Enter Information.
  - How to Ask for Help.
- The Payment Arrangements Screen:
  - What are Computer Screen Fields?
  - What are Function Keys?
  - What are Computer Messages?
  - How to Enter Information.
  - How to Ask for Help.

As soon as the learners enter the scenario, they see this:



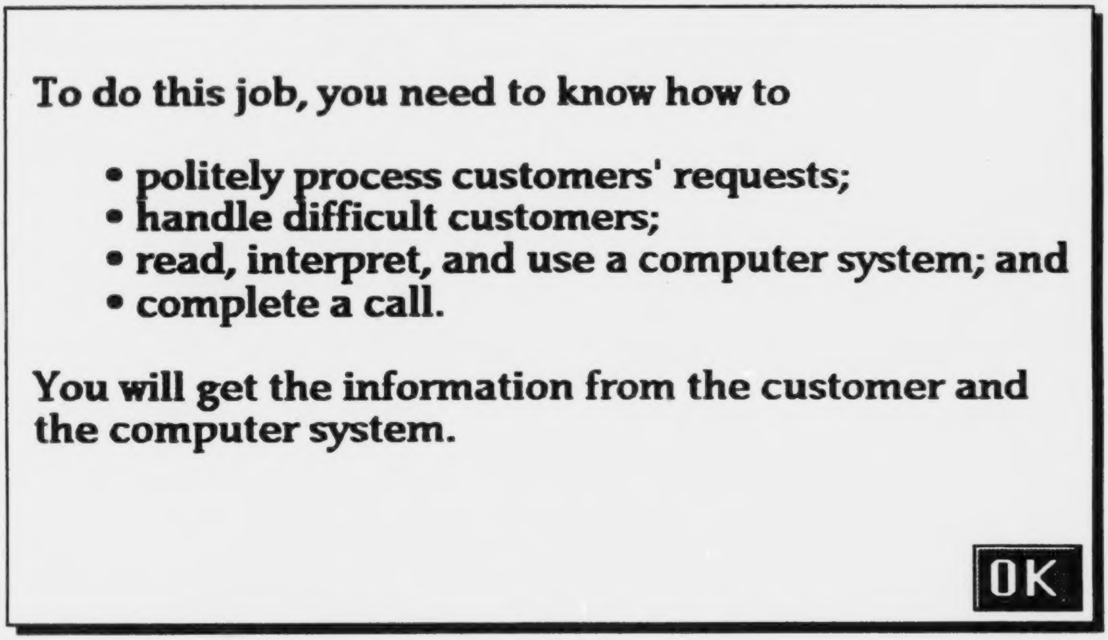
You have been assigned to make adjustments and/or arrangements to customer's billing inquiries.

Ten customers will call in and you are to handle the call in a suitable manner.

Your manager will tell you when you are done for the day.

Press Return to go on.

Then they are told the types of skills they need to complete the scenario.



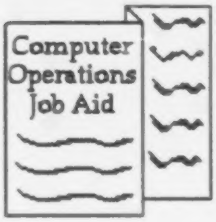
To do this job, you need to know how to

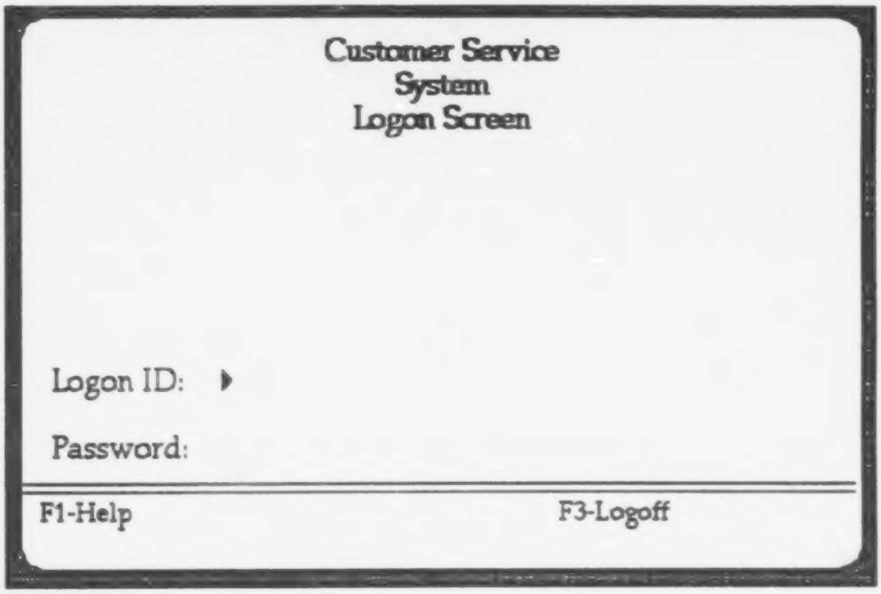
- politely process customers' requests;
- handle difficult customers;
- read, interpret, and use a computer system; and
- complete a call.

You will get the information from the customer and the computer system.

After clicking **OK**, the learners are prompted to complete the Logon Screen. They first enter the Logon ID and press Enter. Then they enter the password and press Enter.

The learners are reminded of their Logon ID and password. If necessary, the learners receive a lesson on IDs and passwords (see Module 2: Computers for a detailed explanation of this process).





**Customer Service
System
Logon Screen**

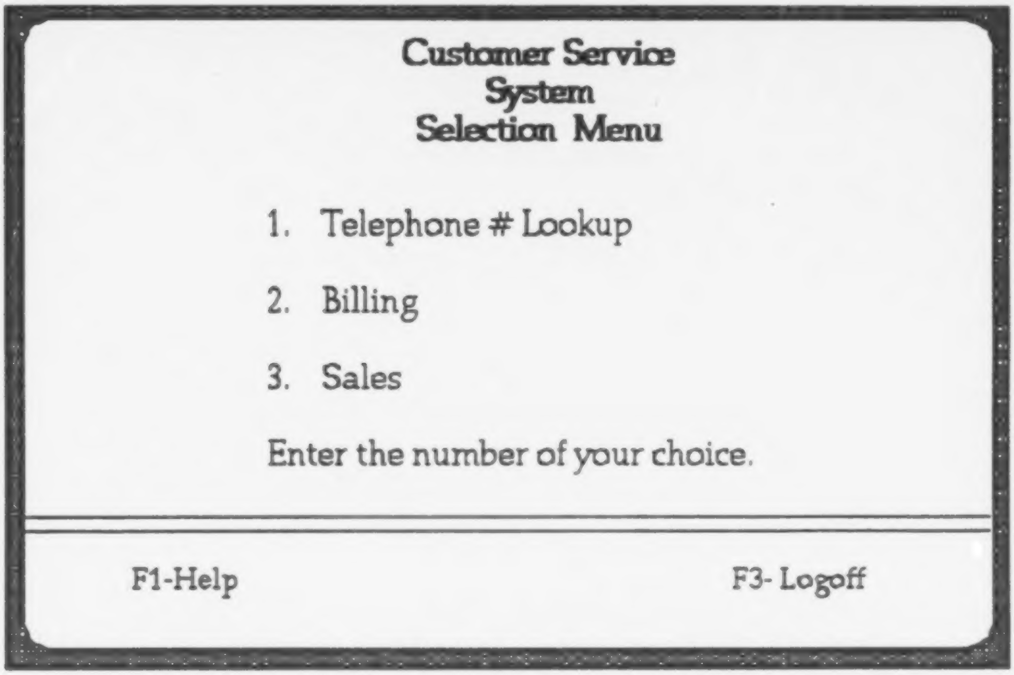
Logon ID: ▸

Password:

F1-Help F3-Logoff

Enter your Logon ID now.
Type in your Logon ID, and press Enter.

Then they are taken to the Customer Service System Selection Menu. For this scenario, they should select option 2, Billing Inquiry. If the learners select other menu choices, they are prompted to select option 2.



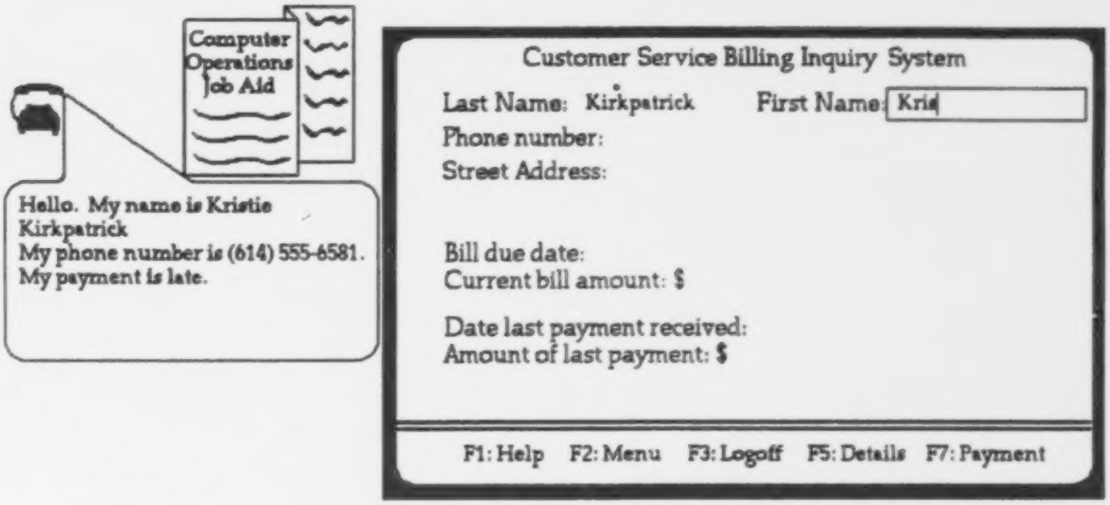
Customer Service
System
Selection Menu

1. Telephone # Lookup
2. Billing
3. Sales

Enter the number of your choice.

F1-Help F3- Logoff

After entering the billing screen, the telephone rings and a customer states the problem. The learners must enter the caller's name and telephone number at this point. To enter information in a field, the learners press the Tab key until the box is around the desired field. Then the learners must press enter to activate that field. When the blinking vertical bar cursor appears, the learners can type information into the field.

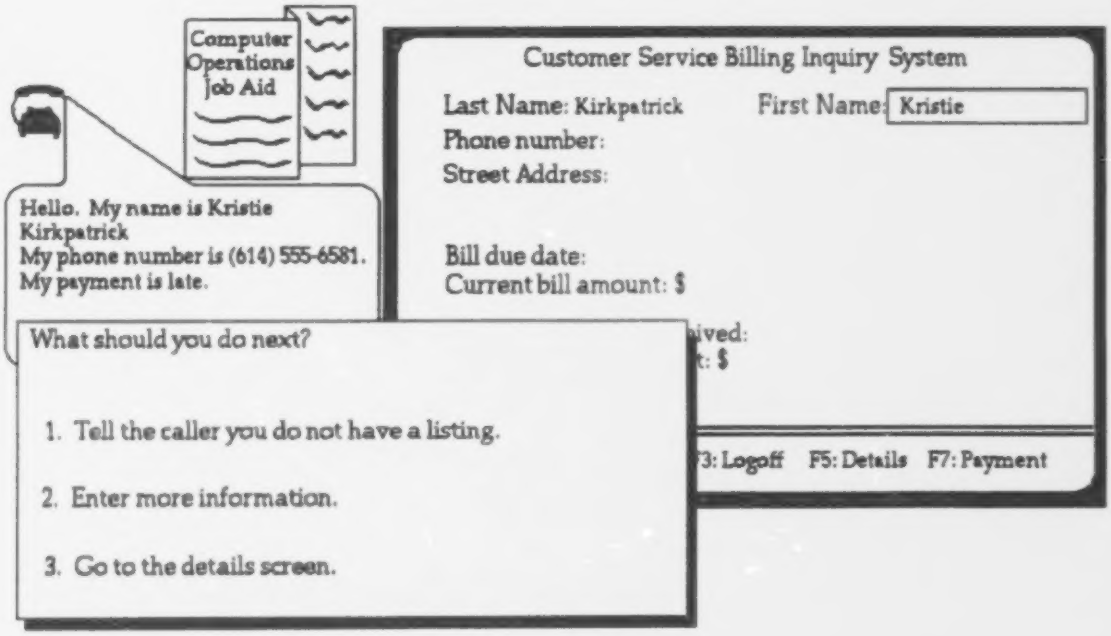

Computer Operations Job Aid

Hello. My name is Kristie Kirkpatrick
My phone number is (614) 555-6581.
My payment is late.

Customer Service Billing Inquiry System
Last Name: Kirkpatrick First Name: Kris
Phone number:
Street Address:
Bill due date:
Current bill amount: $
Date last payment received:
Amount of last payment: $

F1: Help F2: Menu F3: Logoff F5: Details F7: Payment

Throughout the process, the learners are asked questions that encourage them to think about the next step in the process.


Computer Operations Job Aid

Hello. My name is Kristie Kirkpatrick
My phone number is (614) 555-6581.
My payment is late.

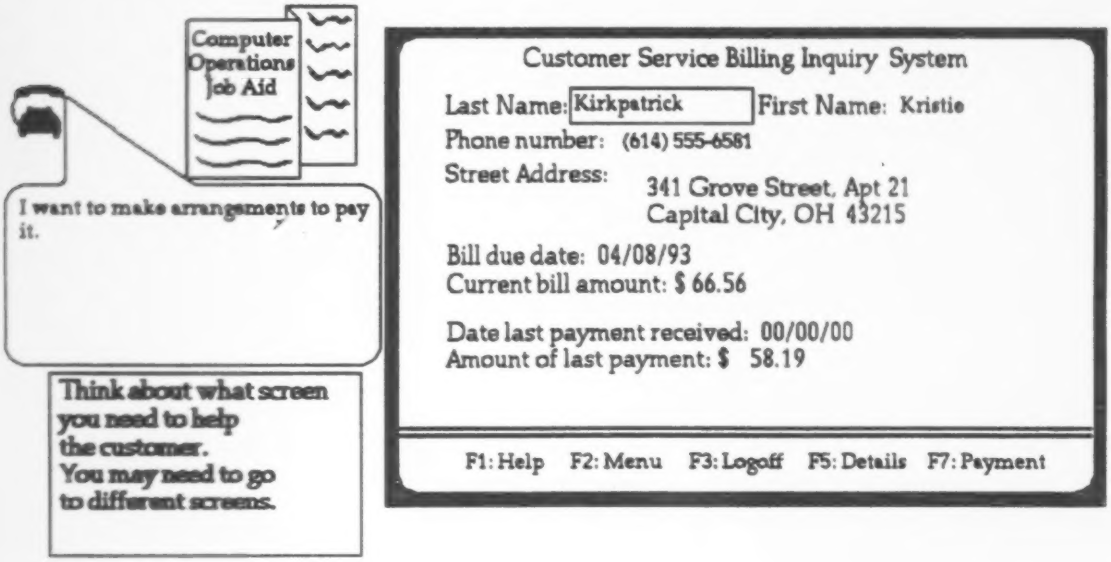
Customer Service Billing Inquiry System
Last Name: Kirkpatrick First Name: Kristie
Phone number:
Street Address:
Bill due date:
Current bill amount: $

What should you do next?

1. Tell the caller you do not have a listing.
2. Enter more information.
3. Go to the details screen.

F3: Logoff F5: Details F7: Payment

Metacognitive prompts often appear to guide the learners through the tasks.



I want to make arrangements to pay it.

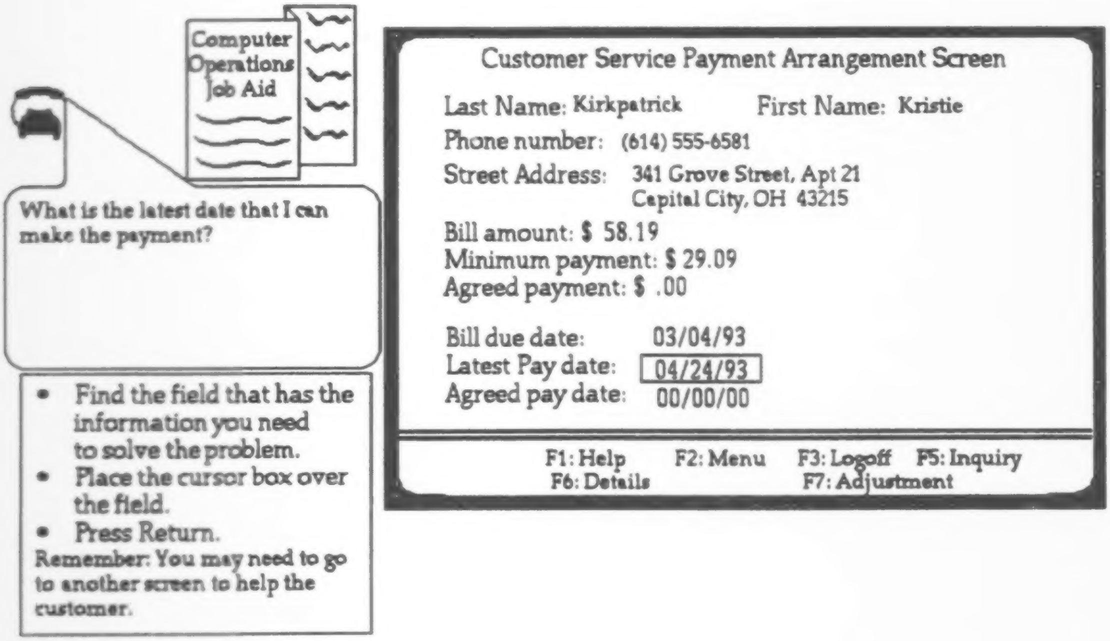
Think about what screen you need to help the customer. You may need to go to different screens.

Customer Service Billing Inquiry System

Last Name: Kirkpatrick First Name: Kristie
Phone number: (614) 555-6581
Street Address: 341 Grove Street, Apt 21
Capital City, OH 43215
Bill due date: 04/08/93
Current bill amount: $ 66.56
Date last payment received: 00/00/00
Amount of last payment: $ 58.19

F1: Help F2: Menu F3: Logoff F5: Details F7: Payment

After being asked about what to do next, the learners are told to carry out that step. In this example, the learners must go to the Customer Service Payment Arrangement Screen as the customer asks to make arrangements to pay her bill. When the learners are ready to give the information to the customer, the computer asks them to put the cursor box around the correct information.



What is the latest date that I can make the payment?

- Find the field that has the information you need to solve the problem.
- Place the cursor box over the field.
- Press Return.

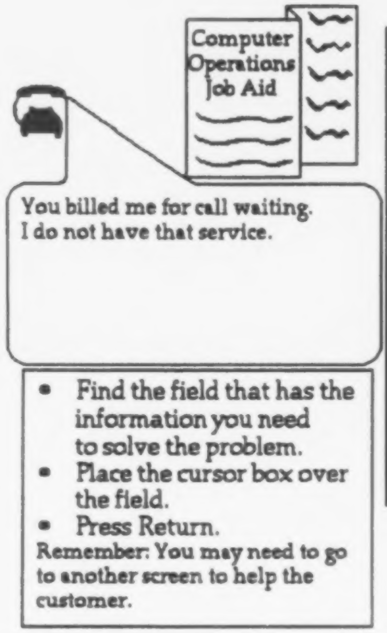
Remember: You may need to go to another screen to help the customer.

Customer Service Payment Arrangement Screen

Last Name: Kirkpatrick First Name: Kristie
Phone number: (614) 555-6581
Street Address: 341 Grove Street, Apt 21
Capital City, OH 43215
Bill amount: $ 58.19
Minimum payment: $ 29.09
Agreed payment: $ .00
Bill due date: 03/04/93
Latest Pay date: 04/24/93
Agreed pay date: 00/00/00

F1: Help F2: Menu F3: Logoff F5: Inquiry
F6: Details F7: Adjustment

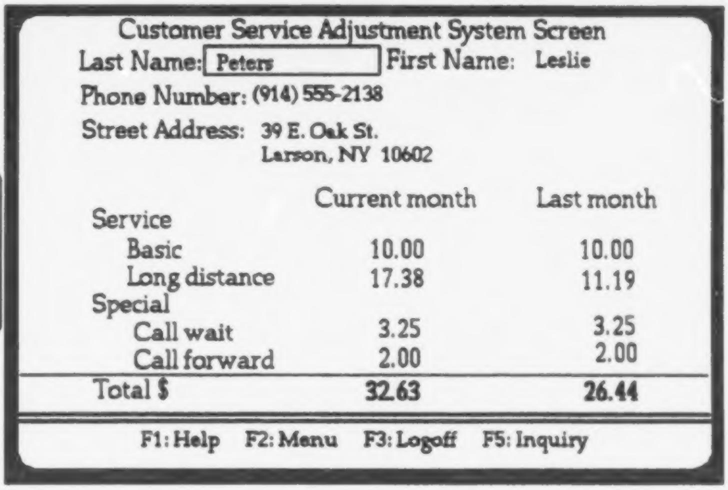
Some tasks may require the learners to change information on the screen. The computer will guide them through this process. In this example, the learners went to the Customer Service Payment Adjustment Screen to complete the task. When the learners are ready to change the information, the computer asks them to move the cursor box to the information and then asks if the information should be changed. The learner must then decide if the information should be changed.



You billed me for call waiting.
I do not have that service.

- Find the field that has the information you need to solve the problem.
- Place the cursor box over the field.
- Press Return.

Remember: You may need to go to another screen to help the customer.



Customer Service Adjustment System Screen

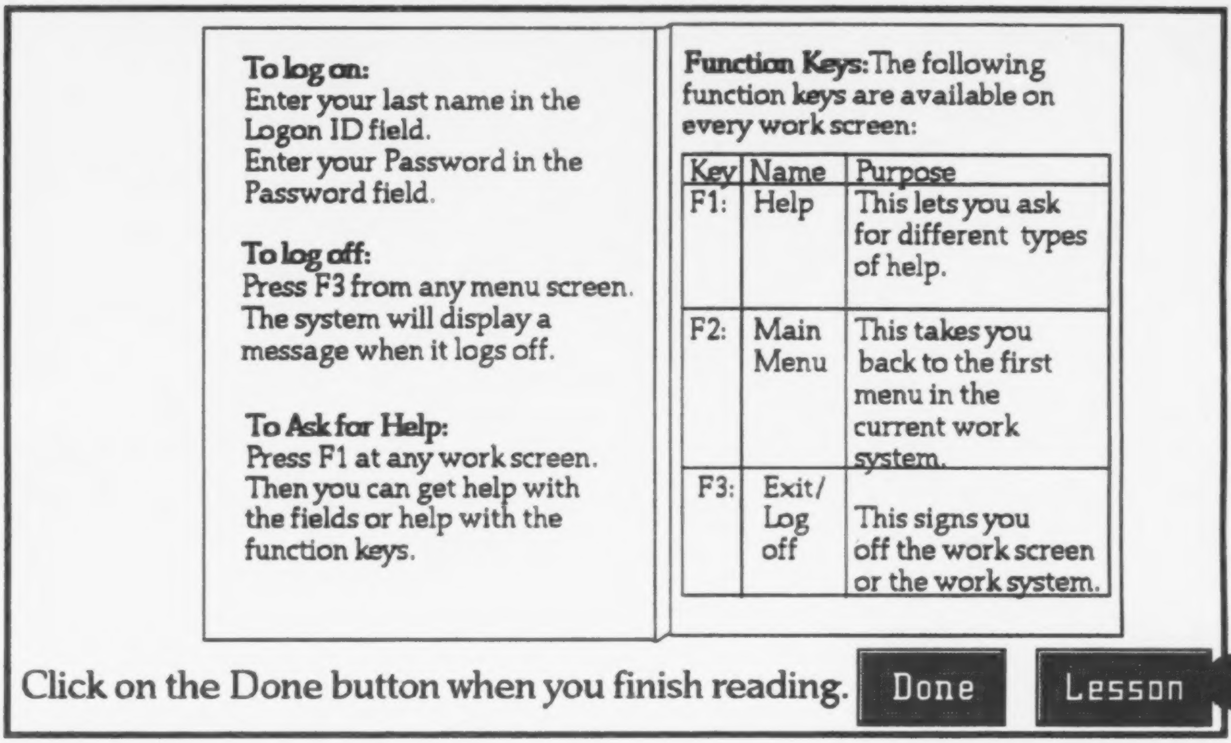
Last Name: Peters First Name: Leslie

Phone Number: (914) 555-2138

Street Address: 39 E. Oak St.
Larson, NY 10602

	Current month	Last month
Service		
Basic	10.00	10.00
Long distance	17.38	11.19
Special		
Call wait	3.25	3.25
Call forward	2.00	2.00
Total $	**32.63**	**26.44**

Learners may look at a Computer Operations Job Aid at any time. The job aid defines the most common procedures on the computer system.



To log on:
Enter your last name in the Logon ID field.
Enter your Password in the Password field.

To log off:
Press F3 from any menu screen. The system will display a message when it logs off.

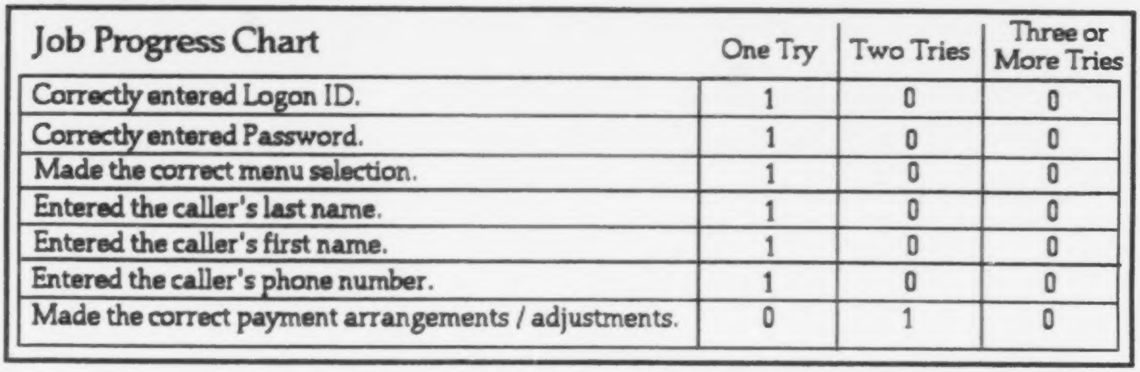
To Ask for Help:
Press F1 at any work screen. Then you can get help with the fields or help with the function keys.

Function Keys: The following function keys are available on every work screen:

Key	Name	Purpose
F1:	Help	This lets you ask for different types of help.
F2:	Main Menu	This takes you back to the first menu in the current work system.
F3:	Exit/ Log off	This signs you off the work screen or the work system.

Click on the Done button when you finish reading.

After correctly completing the call, the learners obtain a Job Progress Chart. This chart tells the learners how many tries it took to correctly complete the task.

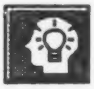


Job Progress Chart	One Try	Two Tries	Three or More Tries
Correctly entered Logon ID.	1	0	0
Correctly entered Password.	1	0	0
Made the correct menu selection.	1	0	0
Entered the caller's last name.	1	0	0
Entered the caller's first name.	1	0	0
Entered the caller's phone number.	1	0	0
Made the correct payment arrangements / adjustments.	0	1	0

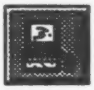
After the learners click on **OK**, another customer calls and the process starts over until ten calls are completed. A learner's cumulative progress is recorded each time a call is completed.

Instructional Aids for the Learner:

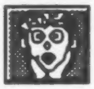
If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.



If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.



If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.



Module 5: Sales—Overview

Prerequisites: Mastery of Module 1: **How to Use This Program**
Completion of Module 2: **Information Sharing—Overview**
Completion of Module 3: **Simple Customer Contact—Overview**
Completion of Module 4: **Complex Customer Contact—Overview**

The Sales Module teaches the basic skills necessary for individuals who want to become customer service representatives and whose job requires selling or suggesting products to the customer. The job includes gathering appropriate information from customers and making decisions about customer needs. This module has the following job scenarios:

1. recommend a product to a customer by using forms to make a decision
2. recommend a product to a customer by using charts to make a decision
3. offer a new service to a customer by using a manual, form, and job aid to write a letter
4. cross-sell products to a customer by using a computer system

The jobs in this module require learners to use information from multiple sources including charts, forms, manuals, and computer systems similar to those they would find on the job. The job may require the learners to synthesize information from more than one source. It also requires the learners to analyze the customer's needs and make recommendations based on that analysis. The job scenarios are as typical and realistic as possible.

Learners must be ready to take notes when required and should have a supply of paper and pencils handy at all times.

Instructional Aids for the Learner:

Learners will follow a prescribed path to successfully perform the tasks in these scenarios. The learner can obtain help in a variety of ways. If the learner needs help reading a particular item, such as a form, the **Learn About** button will provide a list of lessons available on that item.

If the learner needs help deciding what to do next, the **Job** button provides a list of instructions for completing the job.

If the learner is not sure what help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Refer to Module 1 for more information about these buttons.

Module 5: Forms—Recommend Product

In this scenario, learners must recommend a product to a customer. The insurance company the learners work for now offers a new Gold Policy in addition to the Current Policy. The learners must determine which policy is best for their customers. The learners will use Insurance Summary Forms and an Insurance Comparison Form to determine the best product to recommend. Here are the objectives of this scenario:

Main objective:
The learner will determine the best product for the customer by utilizing Insurance Summary Forms to complete an Insurance Comparison Form.

Secondary objectives:

- The learner will obtain the correct information from the Insurance Summary Form.
- The learner will complete the Insurance Comparison Form.
- The learner will decide which insurance plan results in the greatest savings to the customer.
- The learner will complete the form in a timely manner.

These are the basic skills presented in this scenario:

Reading Skills
Read and interpret specific information from written materials.
Read and interpret charts, graphs, tables, and forms.

Organizational and Learning Skills
Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

Communication Skills
Initiate action in response to requests from the supervisor, instructor, or customers.

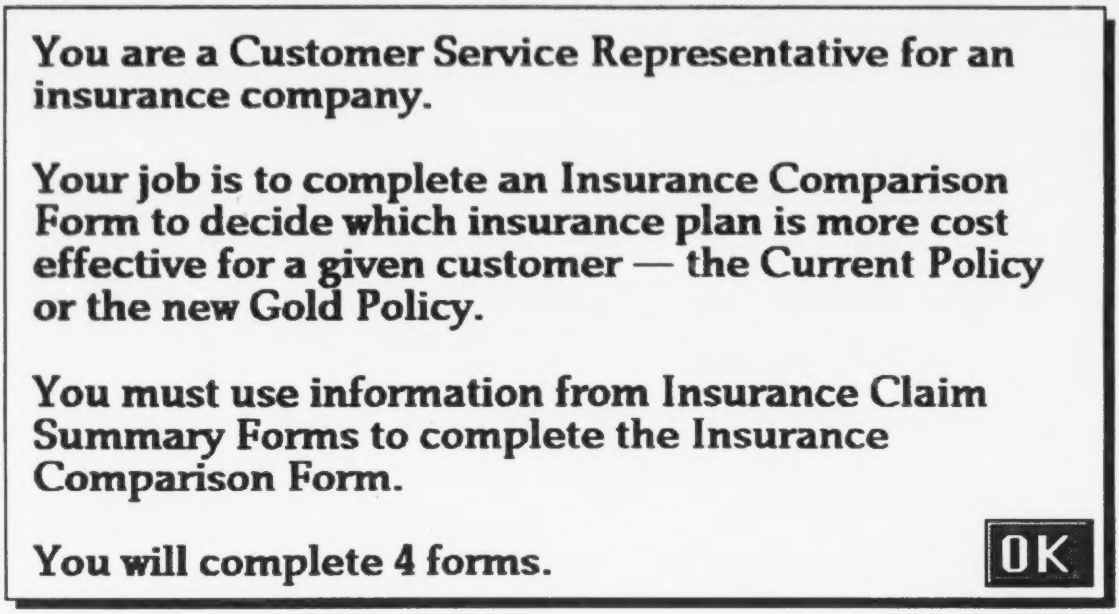
Critical Thinking and Problem-Solving Skills
Identify effective problem-solving strategies such as formulating, evaluating, and choosing options.

Math Skills
Perform simple arithmetic operations.
Determine rates, costs, accounts, or other specifications for various types of items.

This scenario has the following instructional units:

The Insurance Comparison Form:
    What is a Form?
The Insurance Claim Summary Form:
    What is a Form?

When the learners enter the scenario, they see this:



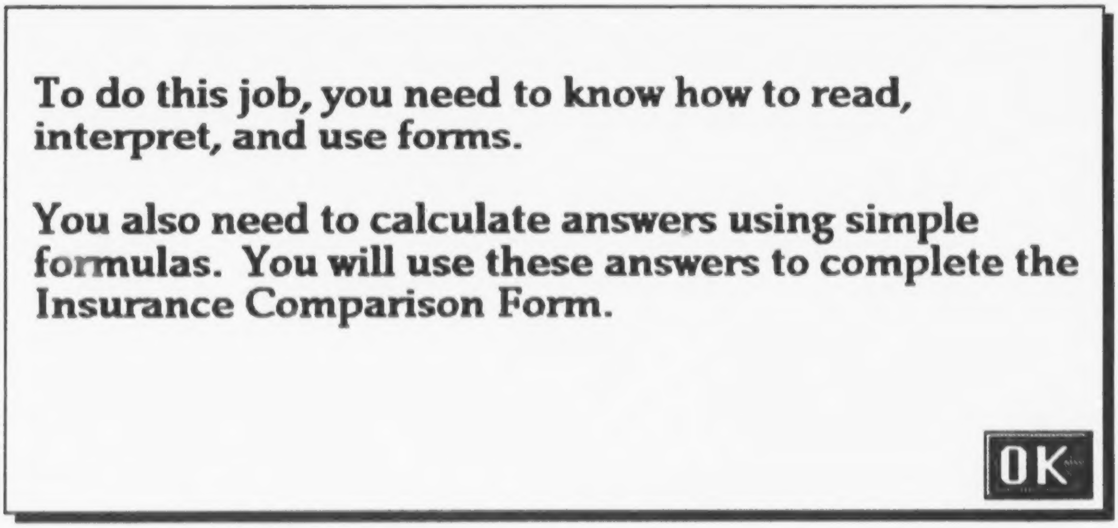
You are a Customer Service Representative for an insurance company.

Your job is to complete an Insurance Comparison Form to decide which insurance plan is more cost effective for a given customer — the Current Policy or the new Gold Policy.

You must use information from Insurance Claim Summary Forms to complete the Insurance Comparison Form.

You will complete 4 forms.

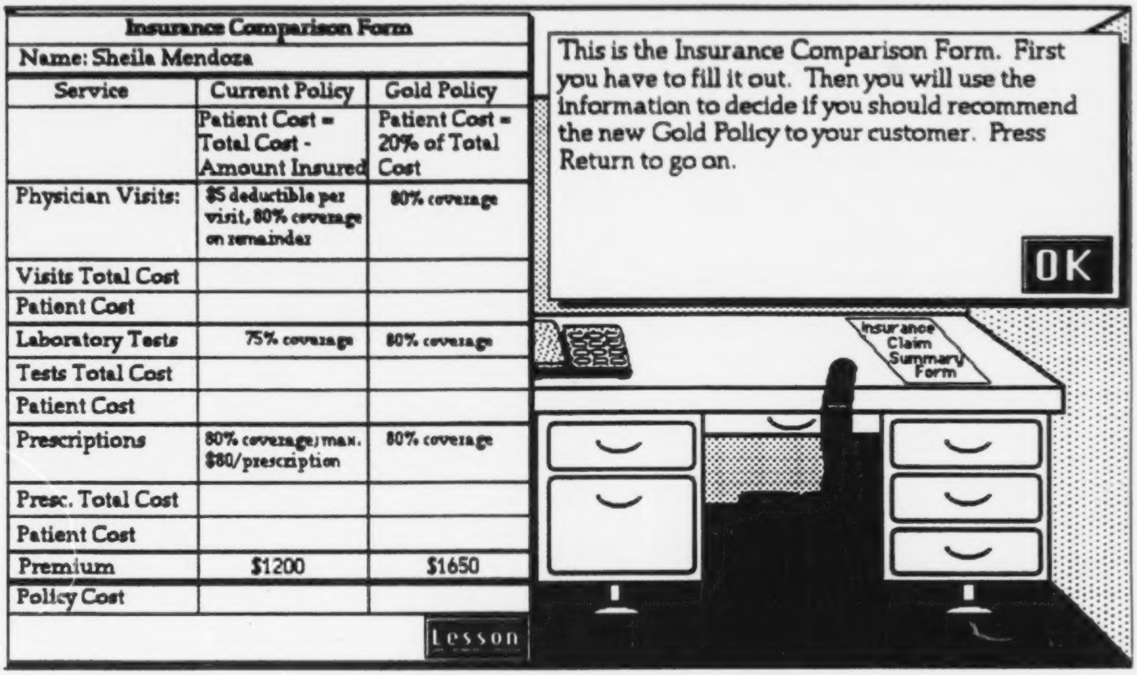
Then they are told the types of skills they will need to complete the scenario.



To do this job, you need to know how to read, interpret, and use forms.

You also need to calculate answers using simple formulas. You will use these answers to complete the Insurance Comparison Form.

At this point, a customer service representative will drop off an Insurance Claim Summary Form and a blank Insurance Comparison Form will appear on the screen.



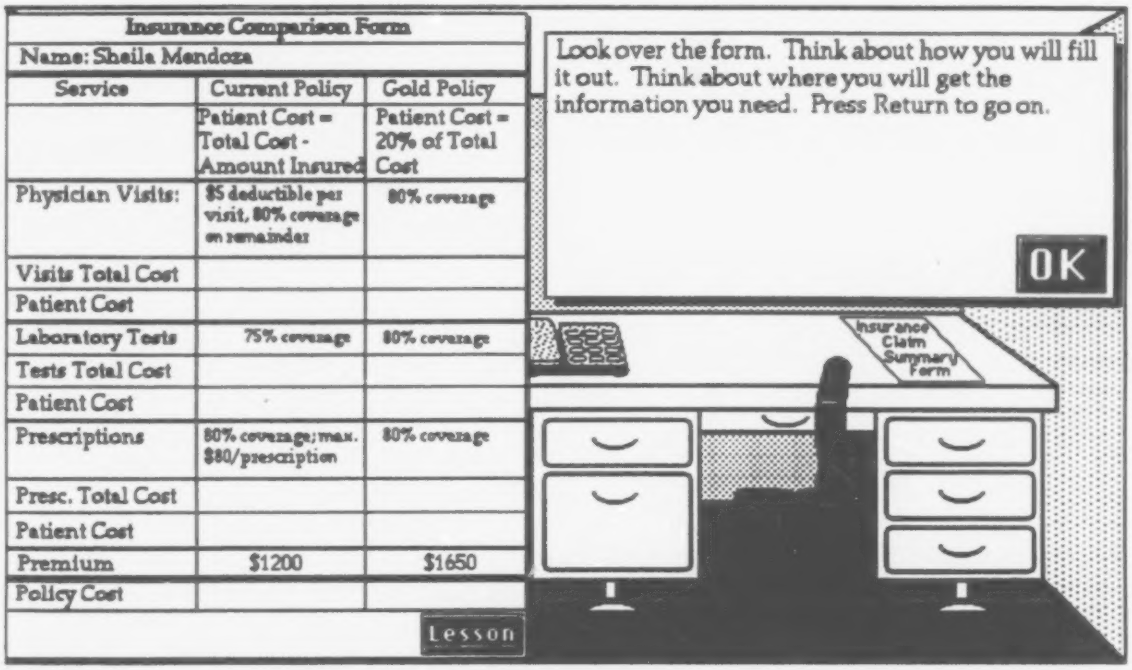
Insurance Comparison Form

Name: Sheila Mendoza

Service	Current Policy	Gold Policy
	Patient Cost = Total Cost - Amount Insured	Patient Cost = 20% of Total Cost
Physician Visits:	$5 deductible per visit, 80% coverage on remainder	80% coverage
Visits Total Cost		
Patient Cost		
Laboratory Tests	75% coverage	80% coverage
Tests Total Cost		
Patient Cost		
Prescriptions	80% coverage; max. $80/prescription	80% coverage
Presc. Total Cost		
Patient Cost		
Premium	$1200	$1650
Policy Cost		

This is the Insurance Comparison Form. First you have to fill it out. Then you will use the information to decide if you should recommend the new Gold Policy to your customer. Press Return to go on.

A series of metacognitive prompts and questions then guide the learners through the process of completing the Insurance Comparison Form.

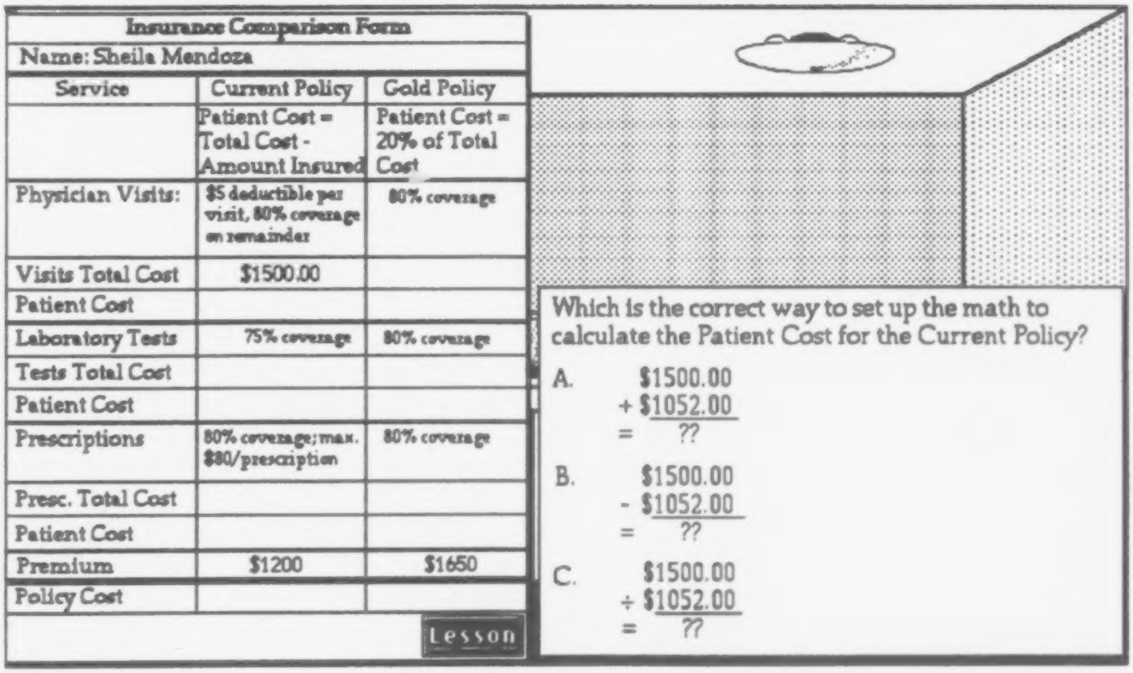


Insurance Comparison Form

Name: Sheila Mendoza

Service	Current Policy	Gold Policy
	Patient Cost = Total Cost - Amount Insured	Patient Cost = 20% of Total Cost
Physician Visits:	$5 deductible per visit, 80% coverage on remainder	80% coverage
Visits Total Cost		
Patient Cost		
Laboratory Tests	75% coverage	80% coverage
Tests Total Cost		
Patient Cost		
Prescriptions	80% coverage; max. $80/prescription	80% coverage
Presc. Total Cost		
Patient Cost		
Premium	$1200	$1650
Policy Cost		

Look over the form. Think about how you will fill it out. Think about where you will get the information you need. Press Return to go on.



Insurance Comparison Form

Name: Sheila Mendoza

Service	Current Policy	Gold Policy
	Patient Cost = Total Cost - Amount Insured	Patient Cost = 20% of Total Cost
Physician Visits:	$5 deductible per visit, 80% coverage on remainder	80% coverage
Visits Total Cost	$1500.00	
Patient Cost		
Laboratory Tests	75% coverage	80% coverage
Tests Total Cost		
Patient Cost		
Prescriptions	80% coverage; max. $80/prescription	80% coverage
Presc. Total Cost		
Patient Cost		
Premium	$1200	$1650
Policy Cost		

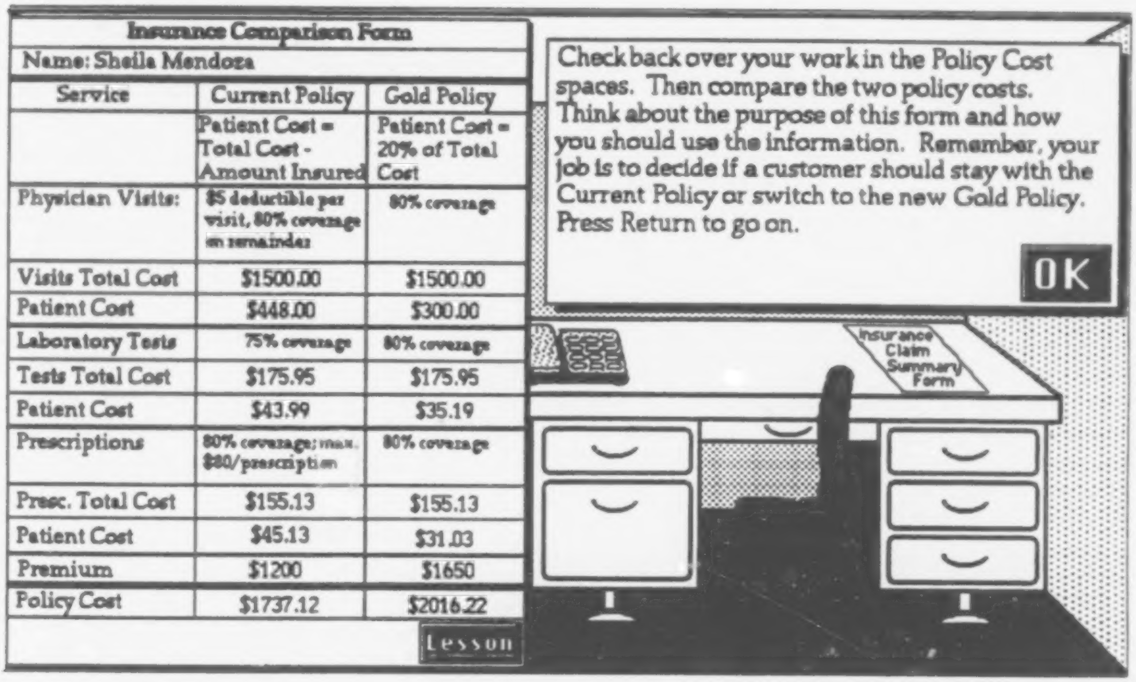
Which is the correct way to set up the math to calculate the Patient Cost for the Current Policy?

A. $\begin{array}{r} \$1500.00 \\ + \underline{\$1052.00} \\ = \quad ?? \end{array}$

B. $\begin{array}{r} \$1500.00 \\ - \underline{\$1052.00} \\ = \quad ?? \end{array}$

C. $\begin{array}{r} \$1500.00 \\ \div \underline{\$1052.00} \\ = \quad ?? \end{array}$

After completing the Insurance Comparison Form, the learners decide which policy to recommend to their customer.



Insurance Comparison Form

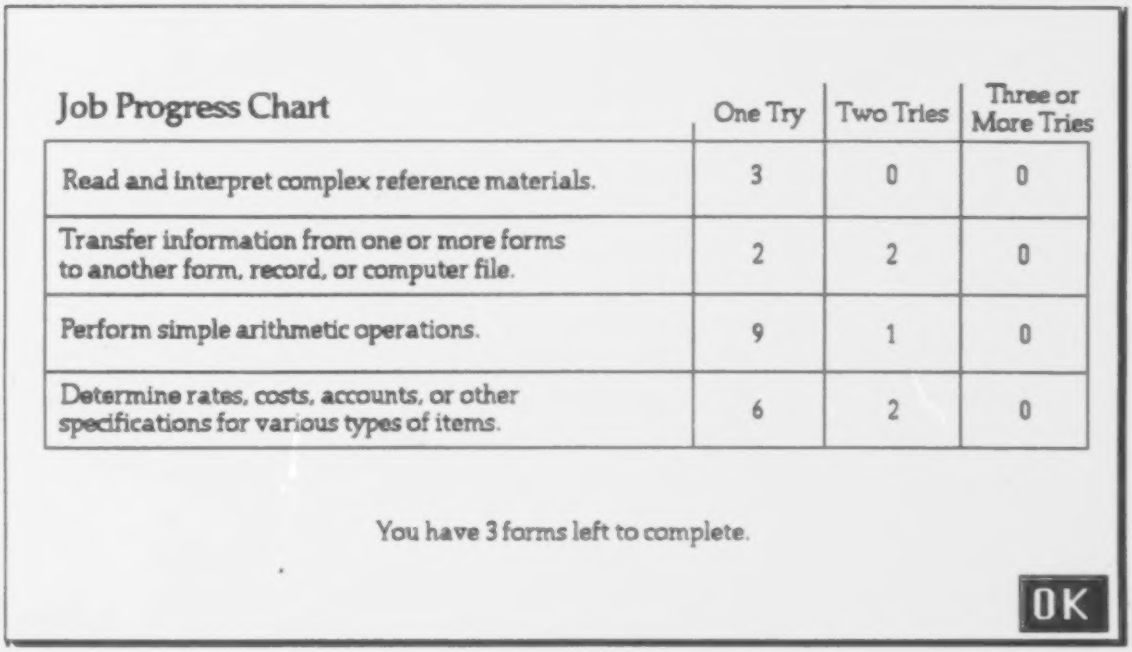
Name: Sheila Mendoza

Service	Current Policy	Gold Policy
	Patient Cost = Total Cost - Amount Insured	Patient Cost = 20% of Total Cost
Physician Visits:	$5 deductible per visit, 80% coverage on remainder	80% coverage
Visits Total Cost	$1500.00	$1500.00
Patient Cost	$448.00	$300.00
Laboratory Tests	75% coverage	80% coverage
Tests Total Cost	$175.95	$175.95
Patient Cost	$43.99	$35.19
Prescriptions	80% coverage; max. $80/prescription	80% coverage
Presc. Total Cost	$155.13	$155.13
Patient Cost	$45.13	$31.03
Premium	$1200	$1650
Policy Cost	$1737.12	$2016.22

Check back over your work in the Policy Cost spaces. Then compare the two policy costs. Think about the purpose of this form and how you should use the information. Remember, your job is to decide if a customer should stay with the Current Policy or switch to the new Gold Policy. Press Return to go on.

The customer is then informed of the learner's decision.

After answering all of the questions, the learners receive a Job Progress Chart containing feedback on their performance.



Job Progress Chart	One Try	Two Tries	Three or More Tries
Read and interpret complex reference materials.	3	0	0
Transfer information from one or more forms to another form, record, or computer file.	2	2	0
Perform simple arithmetic operations.	9	1	0
Determine rates, costs, accounts, or other specifications for various types of items.	6	2	0

You have 3 forms left to complete.

After clicking **OK**, the learners will receive another form until four forms are completed. A learner's cumulative progress is recorded each time an inquiry is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.

If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 5: Charts—Recommend Product

In this scenario, learners must recommend a product to a customer. The learners will use an Interest Rate Chart and a Product Information Chart to locate the best product to recommend. Here are the objectives of this scenario:

Main objective:

The learner will select the appropriate information requested by the customer by utilizing the Interest Rate Chart and the Product Information Chart as reference tools.

Secondary objectives:

- The learner will ask the customer for information needed.
- The learner will make decisions about what information to give to the customer based on Interest Rate Chart and the Product Information Chart.
- The learner will complete the inquiry in a timely manner.

These are the basic skills presented in this scenario:

Reading Skills

Read and interpret specific information from written materials.
Read and interpret charts, graphs, tables, and forms.

Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

Communication Skills

Use the telephone to make and receive business calls.
Formulate and ask questions.
Organize information into an oral report.
Utilize English that is acceptable with supervisors, peers, and clients.
Initiate action in response to requests from the supervisor, instructor, or customers.

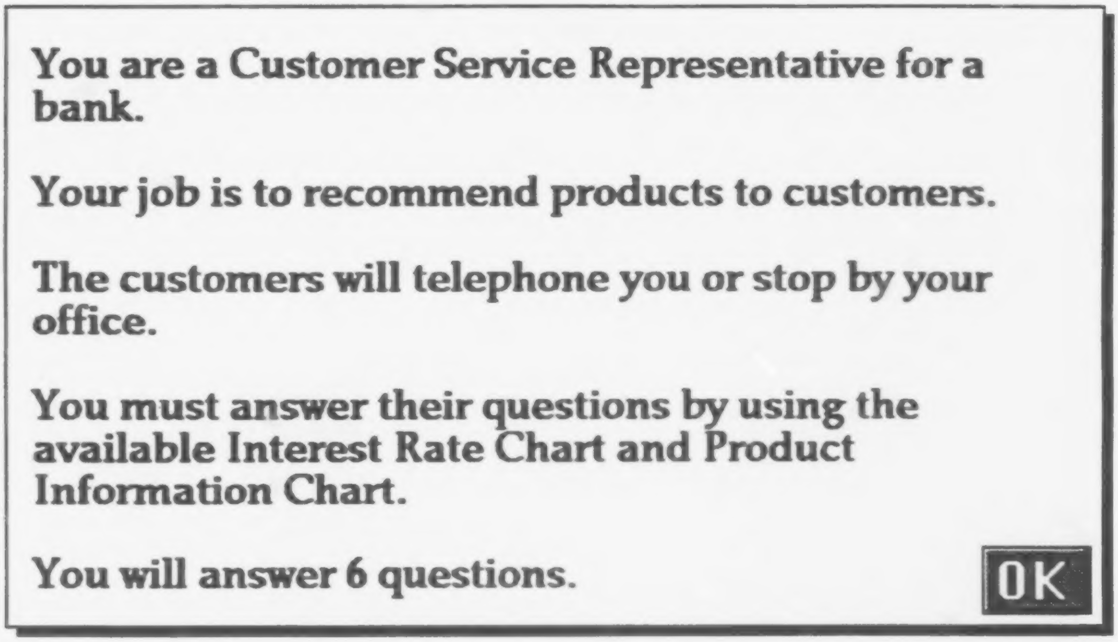
Critical Thinking and Problem-Solving Skills

Identify effective problem-solving strategies such as formulating, evaluating, and choosing options.

This scenario has the following instructional units:

The Interest Rate Chart:
    What is a Chart?
    Using the Interest Rate Chart.
The Product Information Chart:
    What is a Chart?
    Using the Product Information Chart.

When the learners enter the scenario, they see this:



You are a Customer Service Representative for a bank.

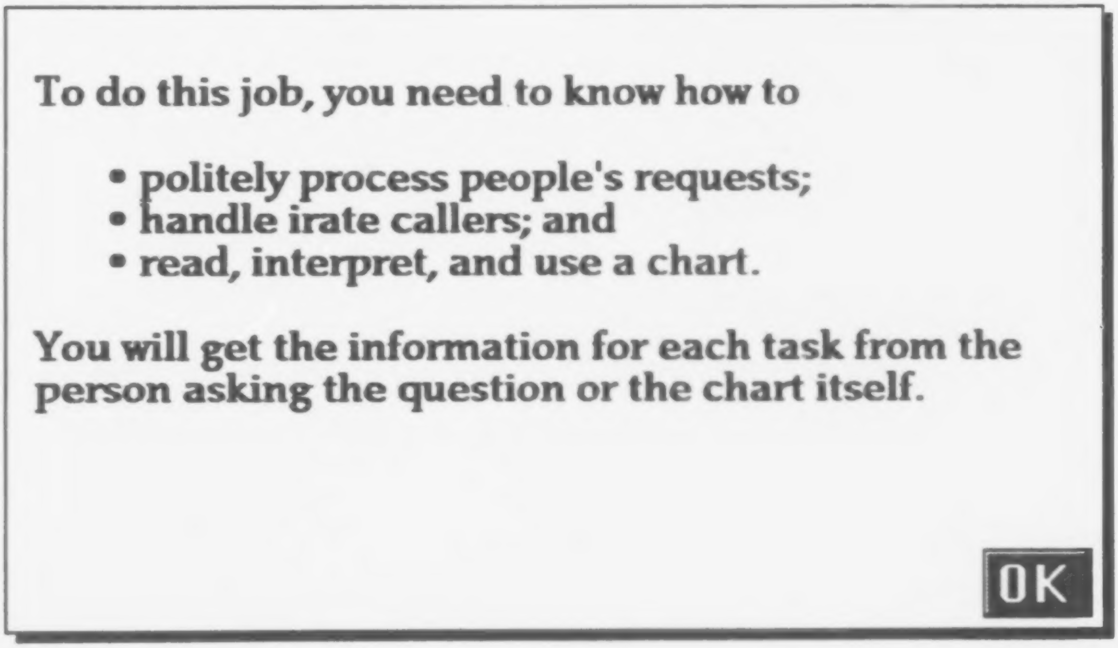
Your job is to recommend products to customers.

The customers will telephone you or stop by your office.

You must answer their questions by using the available Interest Rate Chart and Product Information Chart.

You will answer 6 questions.

Then they are told the types of skills they will need to complete the scenario.

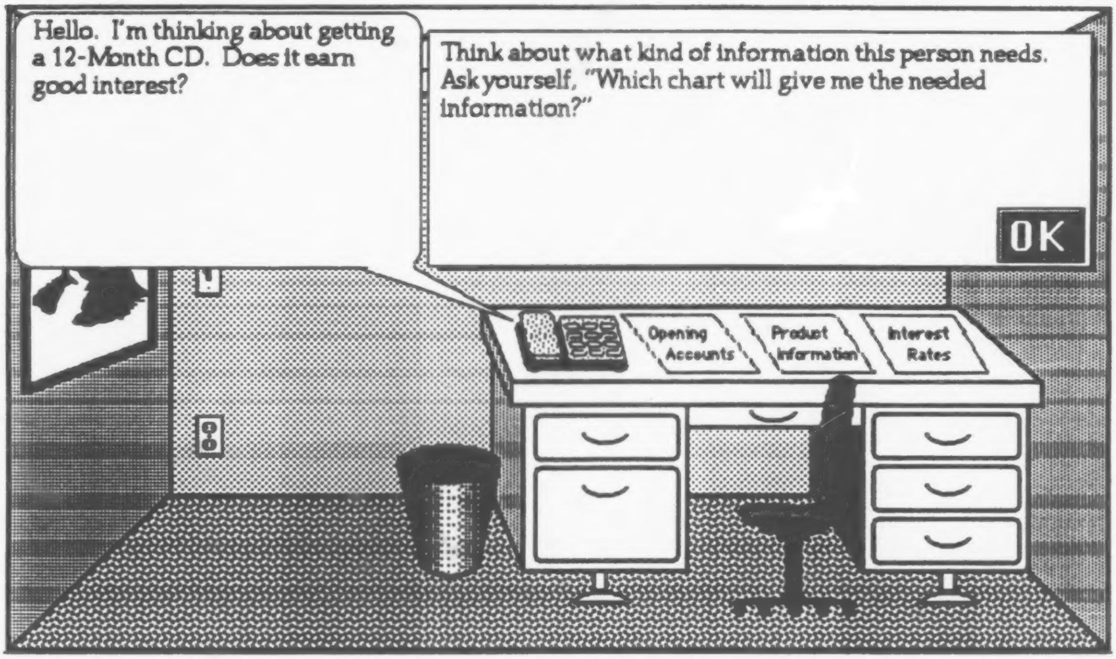


To do this job, you need to know how to

- politely process people's requests;
- handle irate callers; and
- read, interpret, and use a chart.

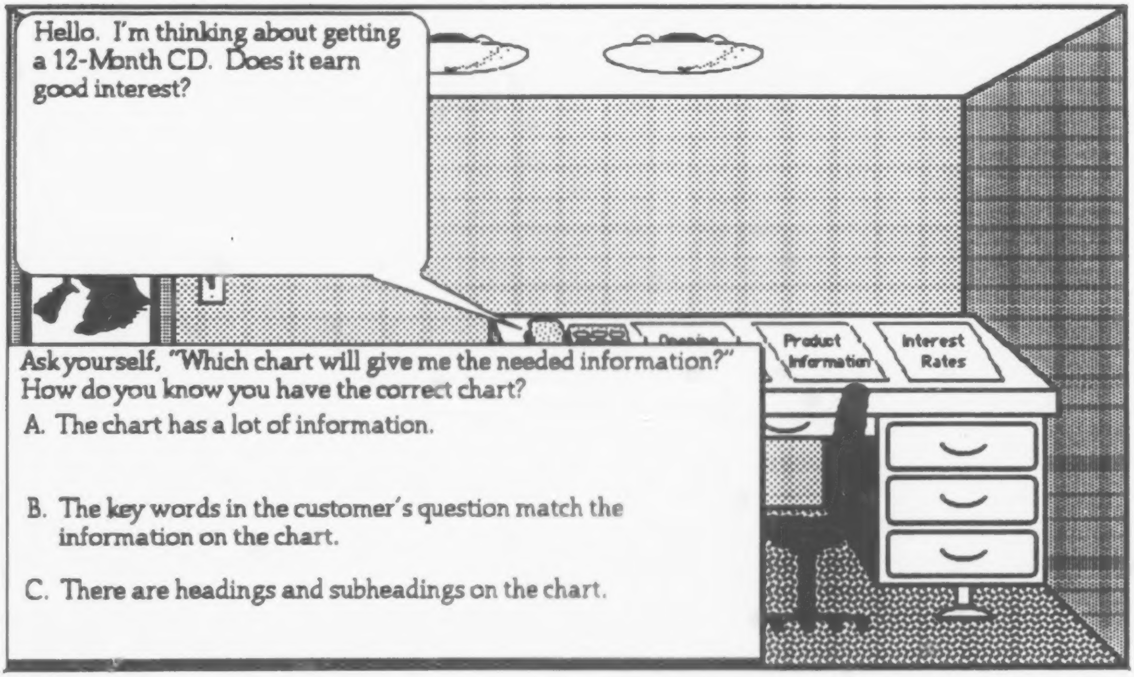
You will get the information for each task from the person asking the question or the chart itself.

At this point, a customer will appear or telephone the learners with a question about a product. The learners will receive metacognitive prompts guiding them through the process of selecting a product to recommend.


Hello. I'm thinking about getting a 12-Month CD. Does it earn good interest?

Think about what kind of information this person needs. Ask yourself, "Which chart will give me the needed information?"

OK
Opening Accounts
Product Information
Interest Rates


Hello. I'm thinking about getting a 12-Month CD. Does it earn good interest?

Ask yourself, "Which chart will give me the needed information?" How do you know you have the correct chart?

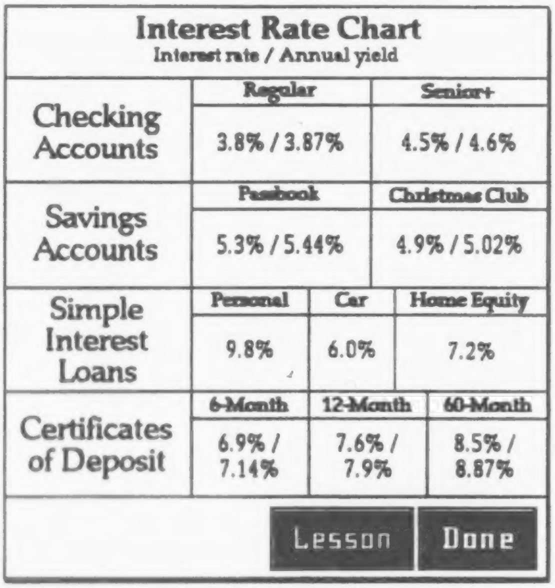
A. The chart has a lot of information.

B. The key words in the customer's question match the information on the chart.

C. There are headings and subheadings on the chart.

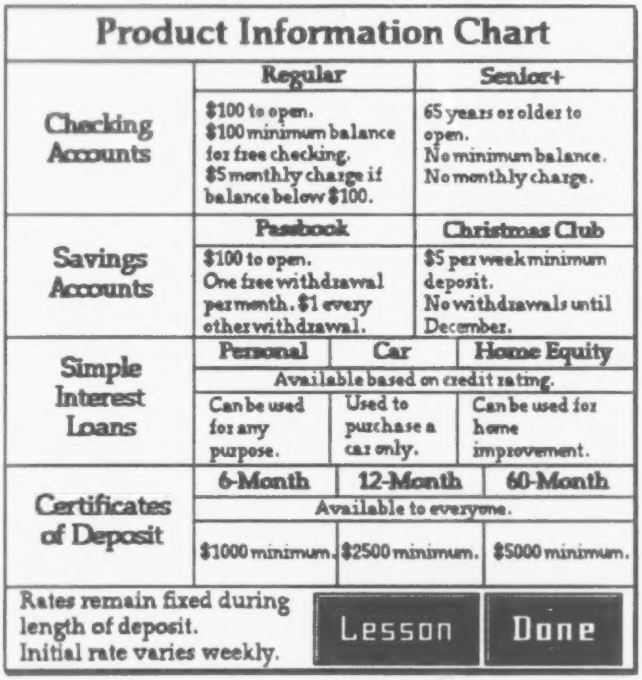
Product Information
Interest Rates

The learners must look at the Interest Rate Chart and/or the Product Information Chart to locate the information they need. To do this, the learners must click on the **Look At** button and then on the appropriate chart.



Interest Rate Chart
Interest rate / Annual yield

Checking Accounts	Regular	Senior+	
	3.8% / 3.87%	4.5% / 4.6%	
Savings Accounts	Passbook	Christmas Club	
	5.3% / 5.44%	4.9% / 5.02%	
Simple Interest Loans	Personal	Car	Home Equity
	9.8%	6.0%	7.2%
Certificates of Deposit	6-Month	12-Month	60-Month
	6.9% / 7.14%	7.6% / 7.9%	8.5% / 8.87%



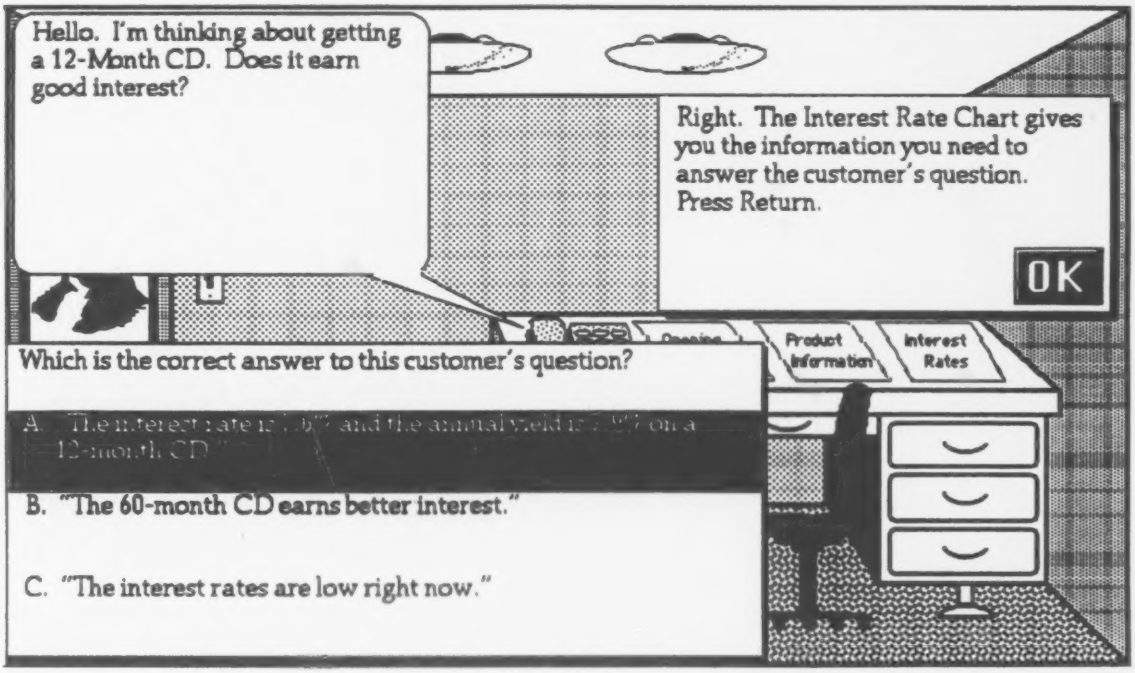
Product Information Chart

Checking Accounts	Regular	Senior+	
	$100 to open. $100 minimum balance for free checking. $5 monthly charge if balance below $100.	65 years or older to open. No minimum balance. No monthly charge.	
Savings Accounts	Passbook	Christmas Club	
	$100 to open. One free withdrawal per month. $1 every other withdrawal.	$5 per week minimum deposit. No withdrawals until December.	
Simple Interest Loans	Personal	Car	Home Equity
	Available based on credit rating.		
	Can be used for any purpose.	Used to purchase a car only.	Can be used for home improvement.
Certificates of Deposit	6-Month	12-Month	60-Month
	Available to everyone.		
	$1000 minimum.	$2500 minimum.	$5000 minimum.

Rates remain fixed during length of deposit.
Initial rate varies weekly.

Learners can receive instruction on these charts by clicking on the **Lesson** button at the bottom of the charts.

The learners must then choose the best product for the customer.



Hello. I'm thinking about getting a 12-Month CD. Does it earn good interest?

Right. The Interest Rate Chart gives you the information you need to answer the customer's question. Press Return.

Which is the correct answer to this customer's question?

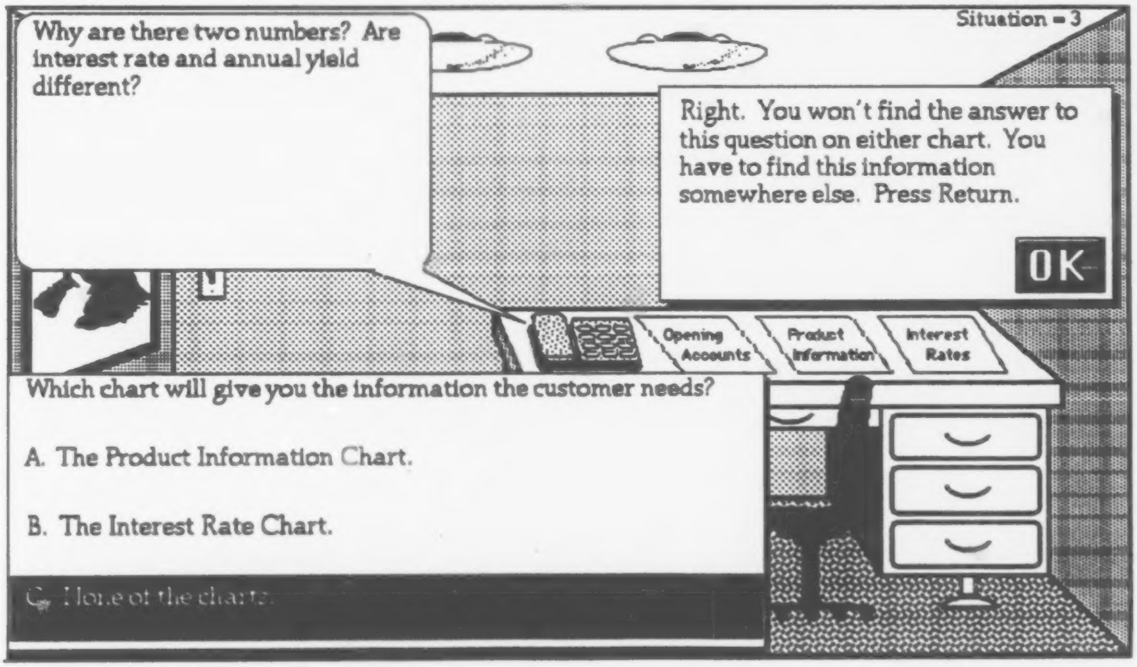
A. "The interest rate is [illegible] and the annual yield is [illegible] on a 12-month CD."

B. "The 60-month CD earns better interest."

C. "The interest rates are low right now."

OK
Opening
Product Information
Interest Rates

In some cases, the customer will ask additional questions the learners must answer.



Why are there two numbers? Are interest rate and annual yield different?

Right. You won't find the answer to this question on either chart. You have to find this information somewhere else. Press Return.

Which chart will give you the information the customer needs?

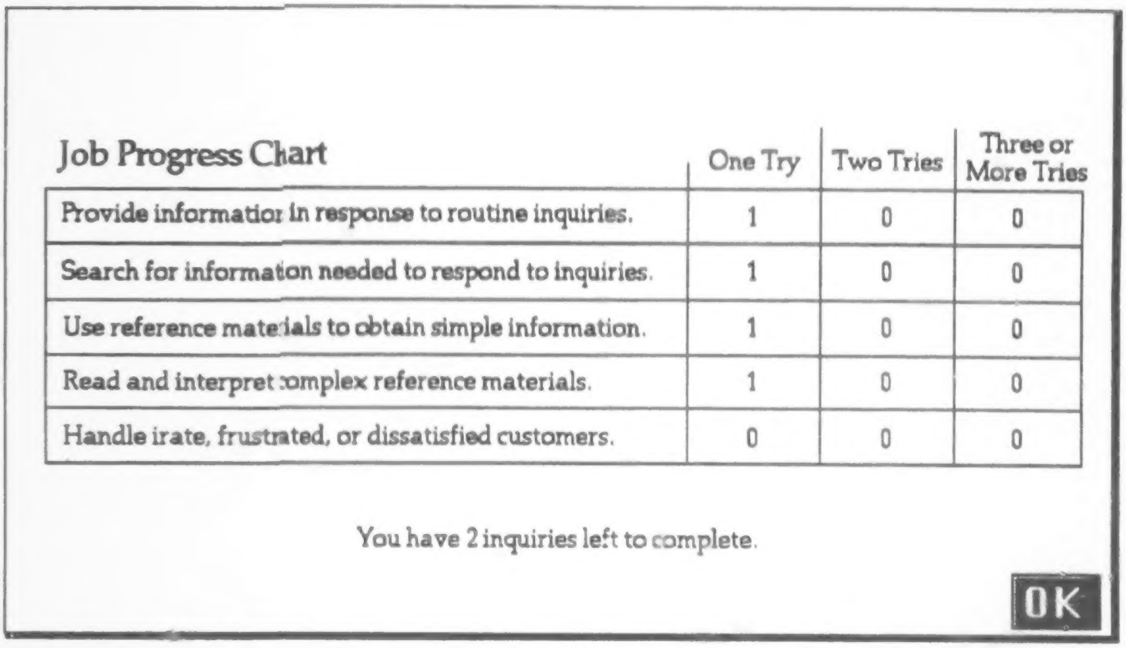
A. The Product Information Chart.

B. The Interest Rate Chart.

C. None of the charts.

Situation = 3
OK
Opening Accounts
Product Information
Interest Rates

After answering all of the questions, the learners receive a Job Progress Chart containing feedback on their performance.



Job Progress Chart	One Try	Two Tries	Three or More Tries
Provide information in response to routine inquiries.	1	0	0
Search for information needed to respond to inquiries.	1	0	0
Use reference materials to obtain simple information.	1	0	0
Read and interpret complex reference materials.	1	0	0
Handle irate, frustrated, or dissatisfied customers.	0	0	0

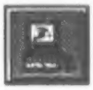
You have 2 inquiries left to complete.

After clicking **OK** the learners will receive another customer inquiry until three inquiries are completed. A learner's cumulative progress is recorded each time an inquiry is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.



If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 5: Manuals—Offer a New Service to a Customer

In this scenario, learners offer a new service to a customer by writing a letter to the customer describing the service. They receive a Service Request Form that describes the service the customer requested and must use information from manuals and job aids to decide what product, if any, to offer to the customer. Here are the objectives of this scenario:

Main objective:

The learner will write a Service Response Letter based on information provided by a customer's Service Request Form, the Customer Service Manual, and the Service Response Letter Job Aid.

Secondary objectives:

- The learner will determine which, if any, service to offer by using the information on the Service Request Form and in the Customer Service Manual.
- The learner will write a letter to the customer describing the action taken on the request for a new service.
- The learner will perform simple math calculations to determine eligibility for certain services.
- The learner will complete the letter in a timely manner.

These are the basic skills presented in this scenario:

Reading Skills

Use reference materials in vocational texts and manuals.
Read and interpret specific information in manuals and job aids.
Read and interpret sequential directions in manuals and job aids.
Use table of contents, index, and appendices in manuals.

Writing Skills

Utilize appropriate mechanics of standard English.
Write letters using correct structure and sentence style.
Write information in a clear, logical, and complete manner.
Use a computer for simple word processing.

Measurement and Numerical Skills

Perform computations of addition, subtraction, multiplication, and division, including multiple operations using decimal fractions.
Round off numbers.

Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

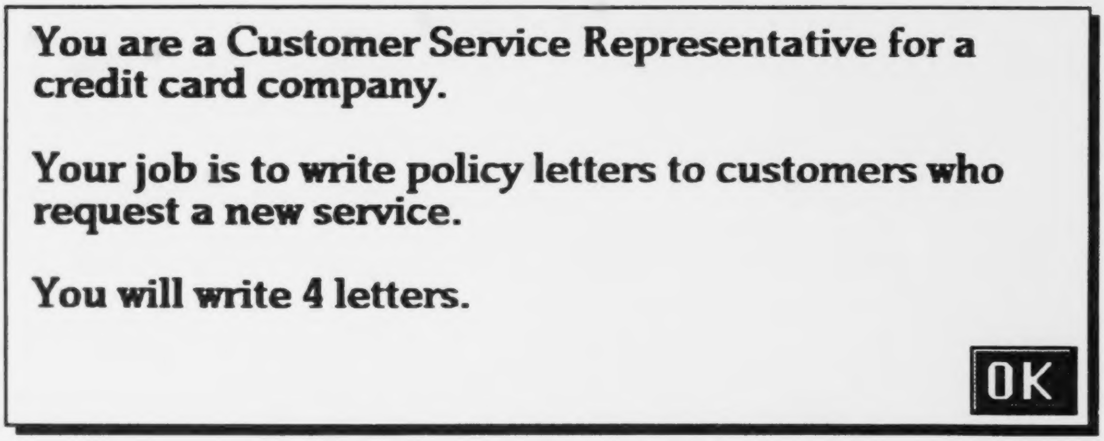
Critical Thinking and Problem-Solving Skills

Identify effective problem-solving strategies such as formulating, evaluating, and choosing solutions.

This scenario has the following instructional units:

The Customer Service Manual:
    What is a Manual?
    How to Use the Table of Contents.
    How to Use an Index.
    How to Use Headings.
    How to Follow a Procedure.
The Service Request Form:
    What is a Form?
    How to Look Up Information on a Form.
Writing the Service Response Letter:
    What is a Letter?
    How to Write a Paragraph.
The Service Request Letter Job Aid:
    What is a Job Aid?

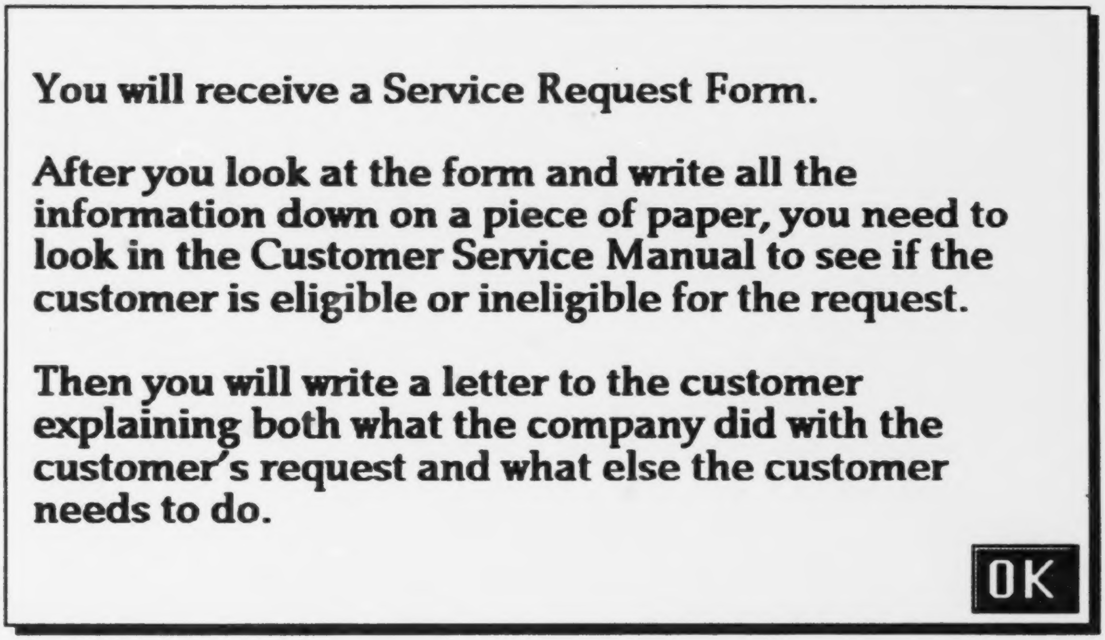
When the learners enter the scenario, they see this:



You are a Customer Service Representative for a credit card company.

Your job is to write policy letters to customers who request a new service.

You will write 4 letters.

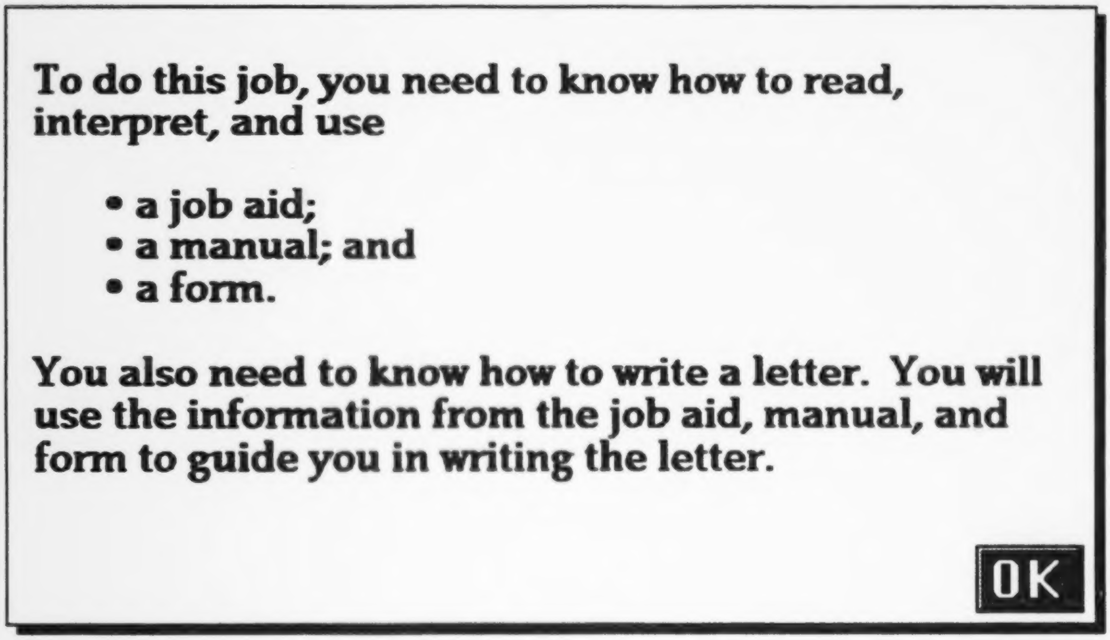


You will receive a Service Request Form.

After you look at the form and write all the information down on a piece of paper, you need to look in the Customer Service Manual to see if the customer is eligible or ineligible for the request.

Then you will write a letter to the customer explaining both what the company did with the customer's request and what else the customer needs to do.

Then they are told the types of skills they will need to complete the scenario.

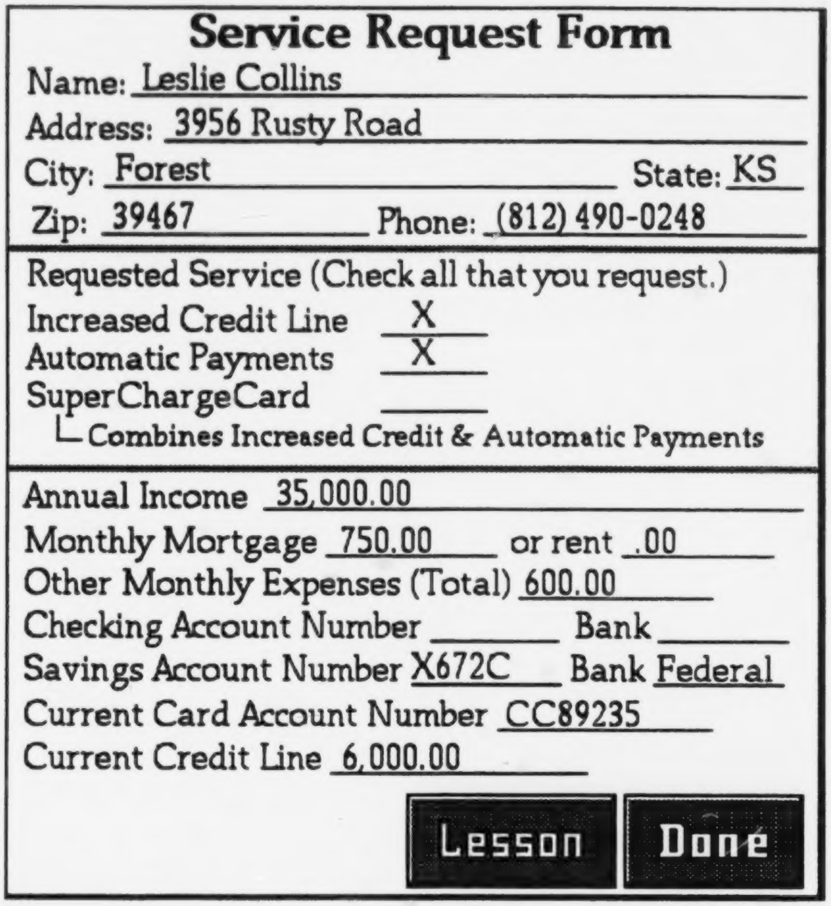


To do this job, you need to know how to read, interpret, and use

- **a job aid;**
- **a manual; and**
- **a form.**

You also need to know how to write a letter. You will use the information from the job aid, manual, and form to guide you in writing the letter.

At this point, someone walks into the office and places a Service Request Form on the desk. The learners will be prompted to look at the form. To do this, learners click on the **Look At** button and then on the form. The learners will then be asked several questions in preparation for writing a letter to the customer explaining what action the company took. The learners will write four letters.



Service Request Form

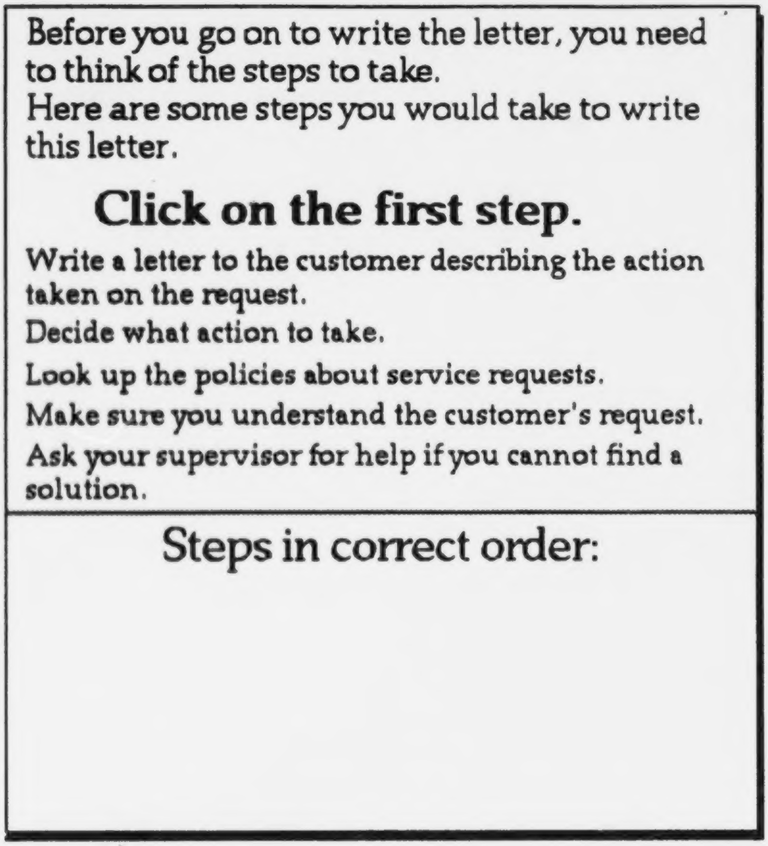
Name: Leslie Collins
Address: 3956 Rusty Road
City: Forest State: KS
Zip: 39467 Phone: (812) 490-0248

Requested Service (Check all that you request.)
Increased Credit Line X
Automatic Payments X
SuperChargeCard ____
└ Combines Increased Credit & Automatic Payments

Annual Income 35,000.00
Monthly Mortgage 750.00 or rent .00
Other Monthly Expenses (Total) 600.00
Checking Account Number ____ Bank ____
Savings Account Number X672C Bank Federal
Current Card Account Number CC89235
Current Credit Line 6,000.00

The learners need to read the form. A lesson on the form can be requested by clicking on the **Lesson** button. The learners click on the **Done** button when they understand the form. The computer then asks a series of metacognitive questions to make sure that the learners understand the information on the form. Then the computer tells the learners to look at the form again and write down the information from the form. **The learners should write down all the information from the form on a piece of paper at this time.**

Then the computer asks a question to prepare the learners to write the letter.



Before you go on to write the letter, you need to think of the steps to take.
Here are some steps you would take to write this letter.

Click on the first step.

Write a letter to the customer describing the action taken on the request.

Decide what action to take.

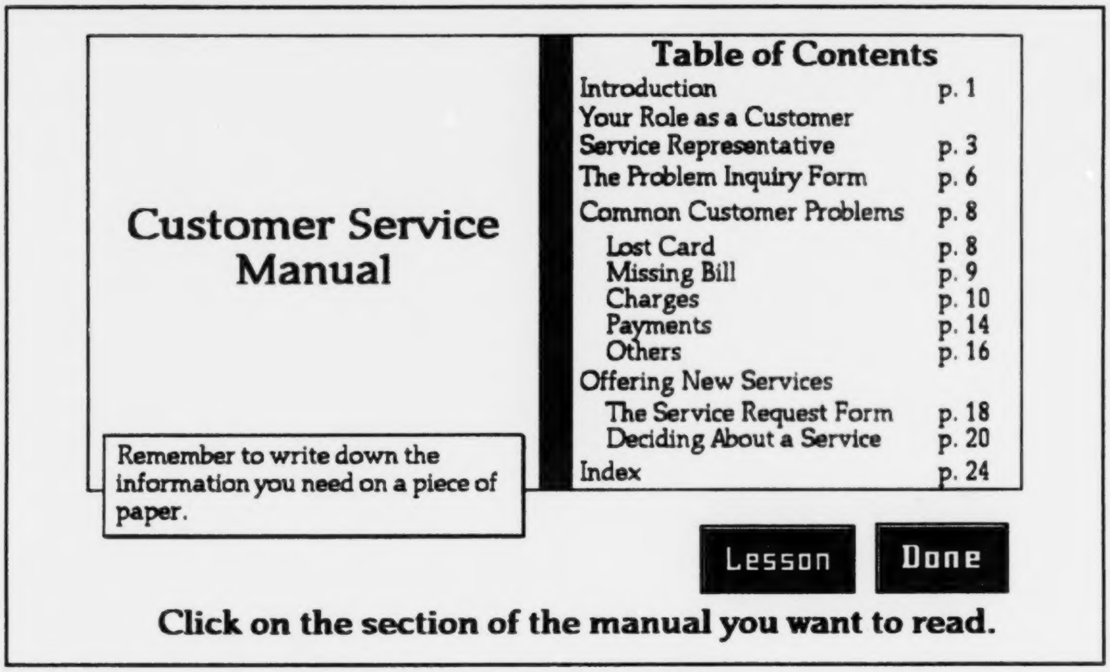
Look up the policies about service requests.

Make sure you understand the customer's request.

Ask your supervisor for help if you cannot find a solution.

Steps in correct order:

The learners are then asked to think about how to write the letter and are asked several metacognitive questions about their understanding of the request. Then the learners are prompted to look at the Customer Service Manual to find the appropriate action to take with this request. To do this, learners click on the **Look At** button and then on the Customer Service Manual.



Customer Service Manual

Table of Contents

Introduction	p. 1
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Missing Bill	p. 9
Charges	p. 10
Payments	p. 14
Others	p. 16
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The Service Request Form	p. 18
Deciding About a Service	p. 20
Index	p. 24

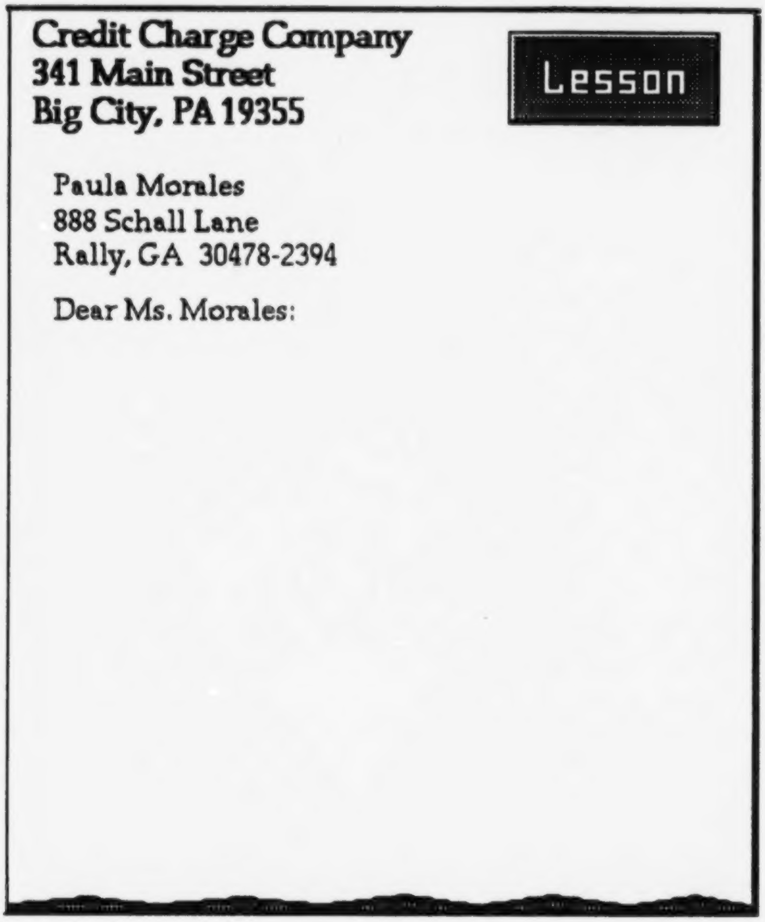
Remember to write down the information you need on a piece of paper.

Click on the section of the manual you want to read.

At this point the learners need to decide how to find the correct place in the manual to determine the eligibility of the customer for the requested service. Learners can click on a section of the Table of Contents or go to the Index and select a topic there. The computer will prompt them as necessary. **When the learners find the correct information, they should write it down on a piece of paper.**

The learners are asked a few more metacognitive questions, then are prompted to write the letter.

To enter information on the letter, learners click on the area in which the information should be entered. A box with a thick black border outlines the area. When the blinking vertical bar cursor appears, learners can type information into that field.



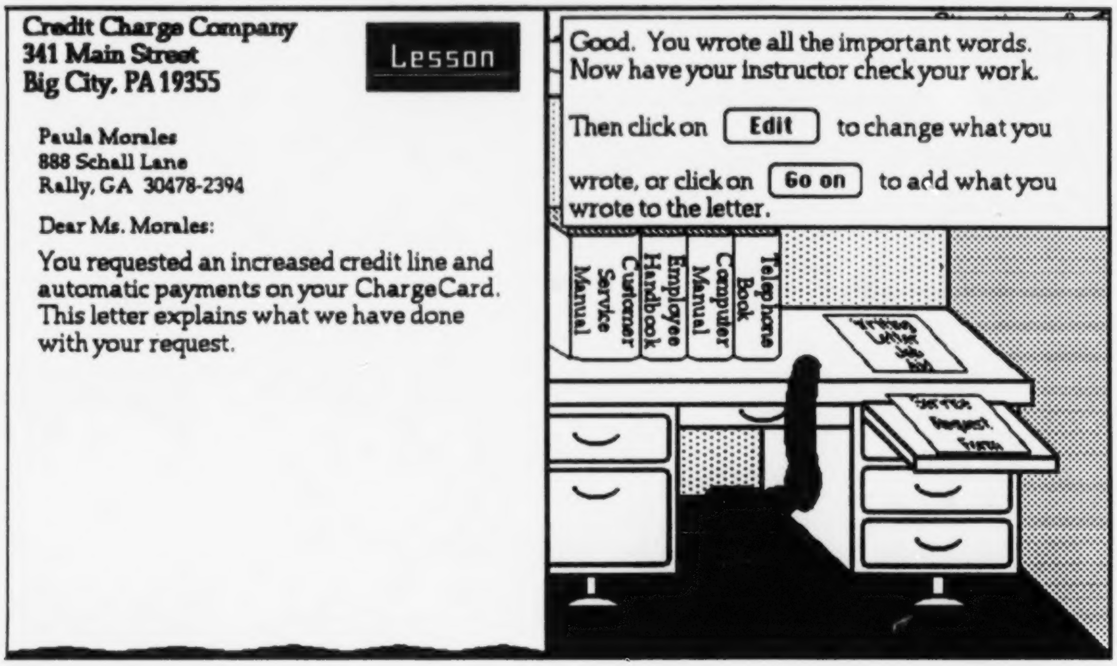
Credit Charge Company
341 Main Street
Big City, PA 19355

Paula Morales
888 Schall Lane
Rally, GA 30478-2394

Dear Ms. Morales:

When learners are within a field, the arrow keys or the mouse will move the blinking vertical bar cursor to the desired position. Pressing the Delete or Backspace key will erase the character immediately to the left of the cursor. Pressing Return or Enter tells the computer learners are finished typing in that area. The computer then evaluates what the learners typed.

The computer takes the learners through the letter writing process step-by-step. The learners are prompted to look at the Service Request Form and the Writing a Service Request Letter Job Aid at appropriate times. At certain points in the process, only key words in the learner's response can be evaluated. Learners must pay close attention to the feedback they receive for the ideal response is shown to learners having difficulty. When learners have used all the key words in their typing, they are told to get the instructor to check the response for correct grammar and punctuation. The instructor should provide guidance to learners with minimal writing skills.



Credit Charge Company
341 Main Street
Big City, PA 19355

Paula Morales
888 Schall Lane
Rally, GA 30478-2394

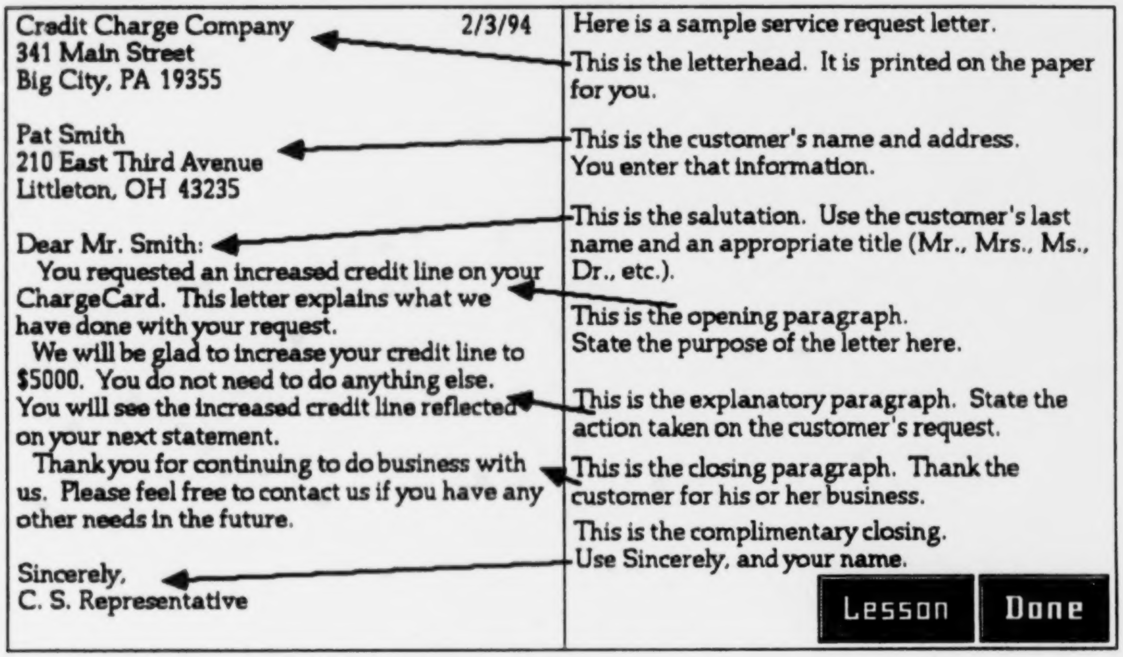
Dear Ms. Morales:

You requested an increased credit line and automatic payments on your ChargeCard. This letter explains what we have done with your request.

Good. You wrote all the important words. Now have your instructor check your work.

Then click on Edit to change what you wrote, or click on Go on to add what you wrote to the letter.

Learners can look at a Writing a Service Response Letter Job Aid at any time. The job aid defines the key aspects of the service response letter. A **Lesson** button on the job aid provides lessons on this particular job aid and job aids in general.



Credit Charge Company 2/3/94
341 Main Street
Big City, PA 19355

Pat Smith
210 East Third Avenue
Littleton, OH 43235

Dear Mr. Smith:

You requested an increased credit line on your ChargeCard. This letter explains what we have done with your request.

We will be glad to increase your credit line to $5000. You do not need to do anything else. You will see the increased credit line reflected on your next statement.

Thank you for continuing to do business with us. Please feel free to contact us if you have any other needs in the future.

Sincerely,
C. S. Representative

Here is a sample service request letter.

This is the letterhead. It is printed on the paper for you.

This is the customer's name and address. You enter that information.

This is the salutation. Use the customer's last name and an appropriate title (Mr., Mrs., Ms., Dr., etc.).

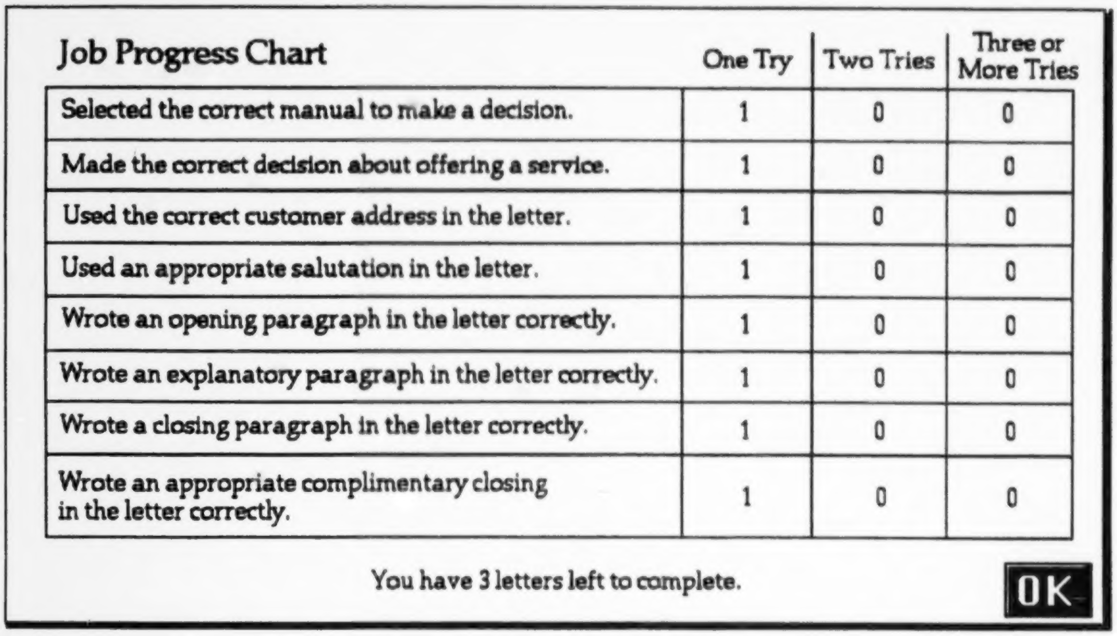
This is the opening paragraph. State the purpose of the letter here.

This is the explanatory paragraph. State the action taken on the customer's request.

This is the closing paragraph. Thank the customer for his or her business.

This is the complimentary closing. Use Sincerely, and your name.

After completing the letter, the learners are asked a few more questions on what to do with the letter. The learners then receive a Job Progress Chart.



Job Progress Chart

	One Try	Two Tries	Three or More Tries
Selected the correct manual to make a decision.	1	0	0
Made the correct decision about offering a service.	1	0	0
Used the correct customer address in the letter.	1	0	0
Used an appropriate salutation in the letter.	1	0	0
Wrote an opening paragraph in the letter correctly.	1	0	0
Wrote an explanatory paragraph in the letter correctly.	1	0	0
Wrote a closing paragraph in the letter correctly.	1	0	0
Wrote an appropriate complimentary closing in the letter correctly.	1	0	0

You have 3 letters left to complete.

The learners will receive another Service Request Form until four letters are completed. A learner's cumulative progress is recorded each time a call is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.

If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

Module 5: Computers—Cross-Sell Products to a Customer

In this scenario, learners offer different products to the customer based on the customer's needs. A customer calls with either a specific problem or a request for a service. Learners must determine the appropriate product by completing computer screens and reading the available materials. Here are the objectives of this scenario:

Main objective:
The learner will offer the appropriate product based on information obtained from the customer, the computer screen, and job aids.

Secondary objectives:
- The learner will log on and log off of the computer.
- The learner will ask the customer for information needed.
- The learner will complete the computer screen with information obtained from the customer.
- The learner will make decisions about what information is needed based on the computer screen information.
- The learner will use the appropriate F-keys based on the computer screen instructions.
- The learner will complete the call in a timely manner.

These are the basic skills presented in this scenario:

Reading Skills

Read and interpret sequential directions in textbooks, manuals, and handouts.
Read directions and interpret basic computer materials, e.g., printouts, software programs, etc.

Writing Skills

Record date, time, and other requested information on work forms.

Organizational and Learning Skills

Use note-taking skills for remembering important information.
Demonstrate ability to organize time and prioritize personal, educational, and workplace responsibilities.
Use resources to seek information, e.g., labels, manuals, job aids.

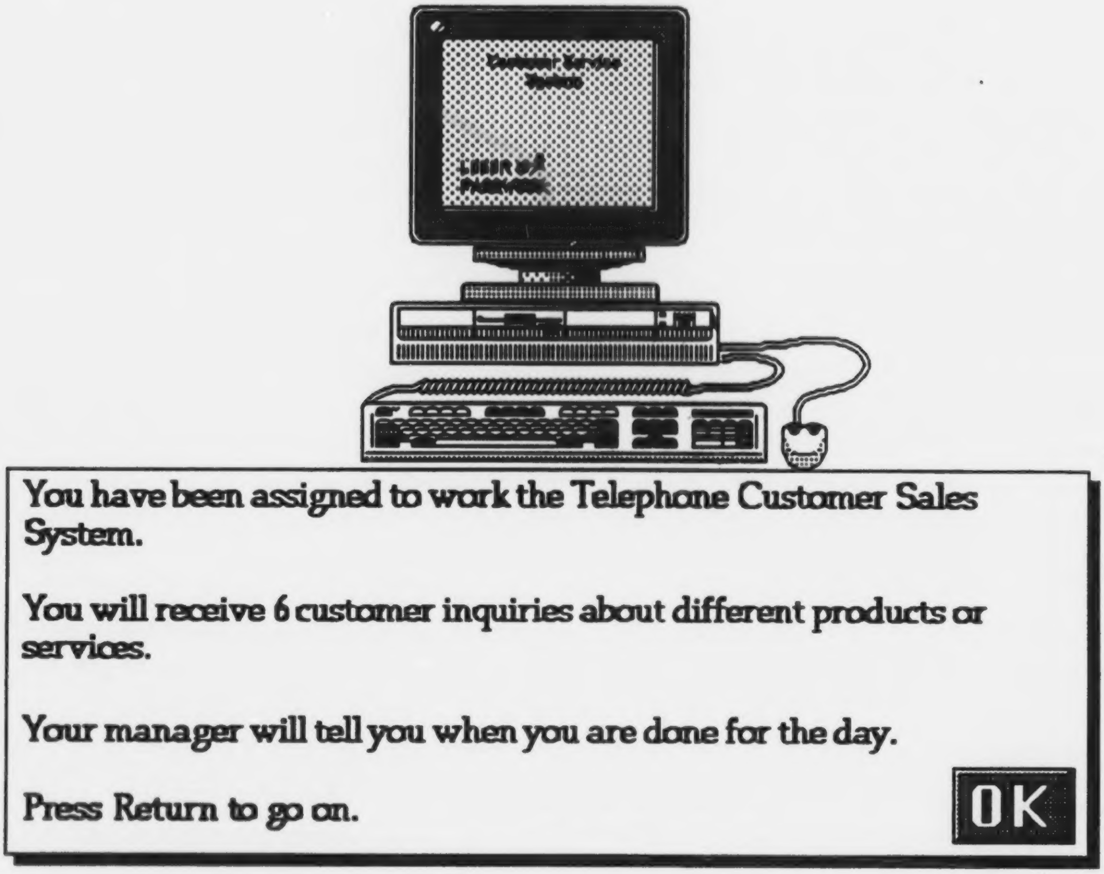
Critical Thinking and Problem-Solving Skills

Identify effective problem-solving strategies such as formulating, evaluating, and choosing solutions.

This scenario includes the following instructional units:

- The Computer Operations Job Aid:
  - What is a Job Aid?
- The Product and Service Comparison Job Aid:
  - What is a Job Aid?
  - How to Compare and Contrast.
- The Logon Screen:
  - What are Computer Screen Fields?
  - What are Computer Messages?
  - How to Ask for Help.
- The Customer Service Selection Menu:
  - What are Computer Screen Fields?
  - What are Computer Messages?
  - How to Ask for Help.
- The Product Sales Screen:
  - What are Computer Screen Fields?
  - What are Function Keys?
  - What are Computer Messages?
  - How to Enter Information.
  - How to Ask for Help.
- The Service Sales Screen:
  - What are Computer Screen Fields?
  - What are Function Keys?
  - What are Computer Messages?
  - How to Enter Information.
  - How to Ask for Help.

As soon as learners enter the scenario, they see this:



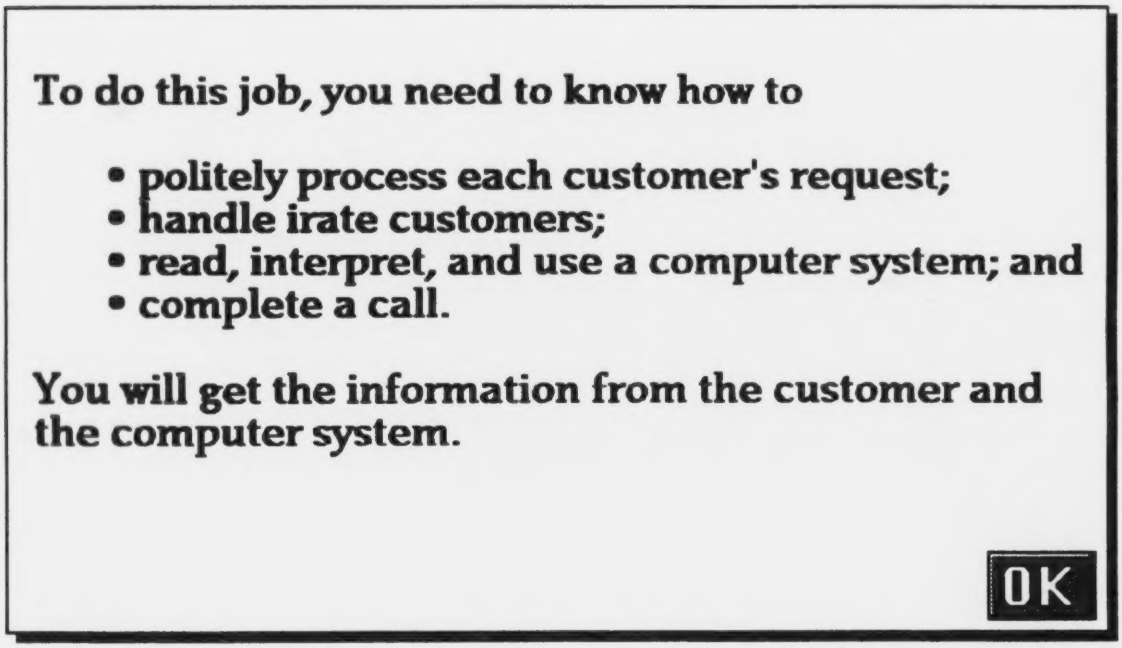
You have been assigned to work the Telephone Customer Sales System.

You will receive 6 customer inquiries about different products or services.

Your manager will tell you when you are done for the day.

Press Return to go on.

Then they are told the types of skills they will need to complete the scenario.



To do this job, you need to know how to

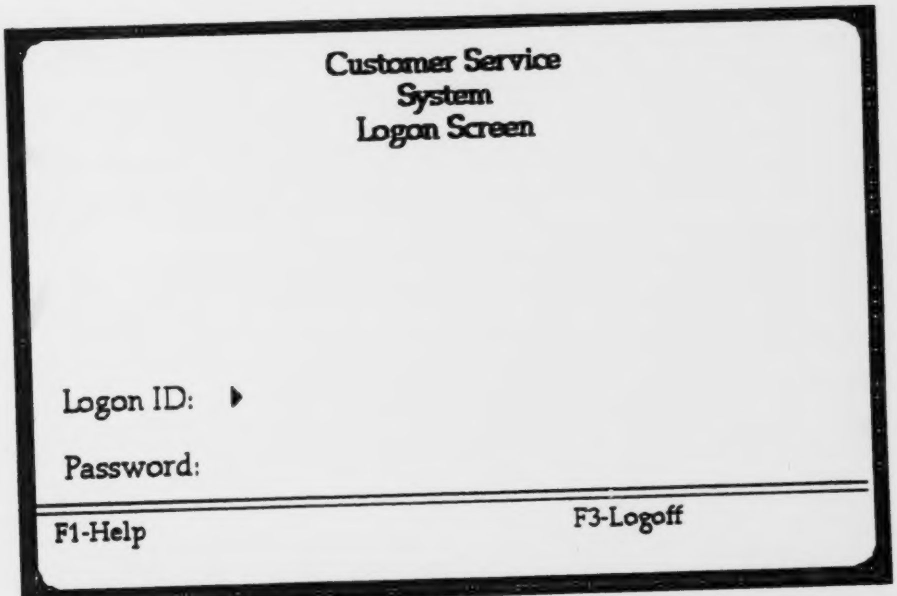
- **politely process each customer's request;**
- **handle irate customers;**
- **read, interpret, and use a computer system; and**
- **complete a call.**

You will get the information from the customer and the computer system.

After clicking OK, the learners are prompted to complete the Logon Screen. They first enter the Logon ID and press Enter. Then they enter the password and press Enter.

The learners are reminded of their Logon ID and password. If necessary, the learners receive a lesson on IDs and passwords (see Module 2: Computers for a detailed explanation of this process).

Computer
Operations
Job Aid


Customer Service
System
Logon Screen

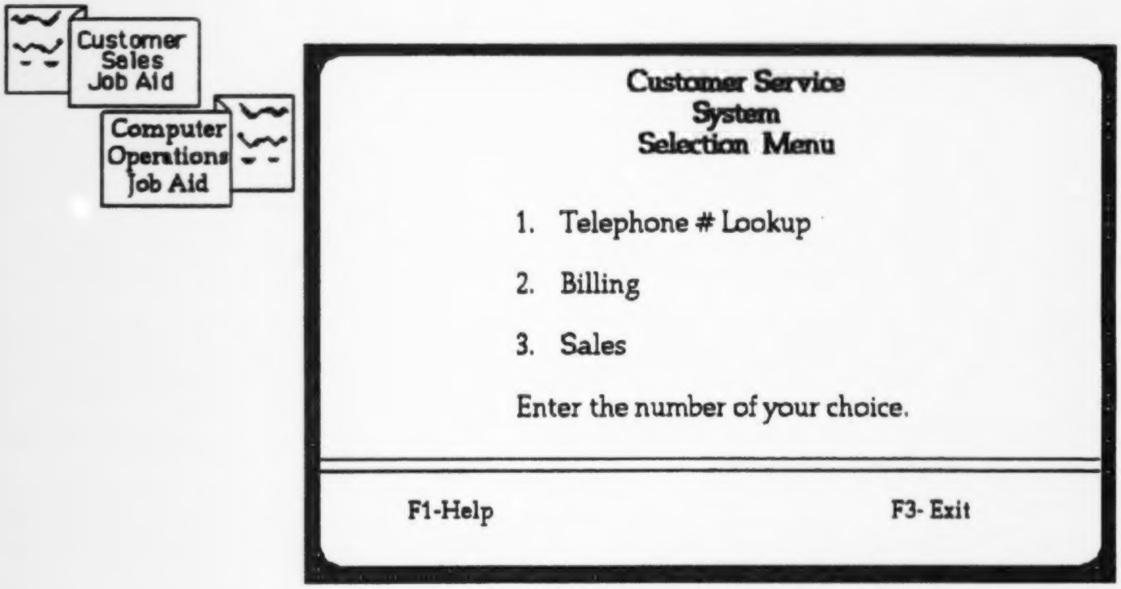
Logon ID: ▸

Password:

F1-Help F3-Logoff

Enter your Logon ID now.
Type in your Logon ID, and press Enter.

After entering their Logon ID and password, learners are taken to the Customer Service System Selection Menu. For this scenario, they should select option 3, Sales.

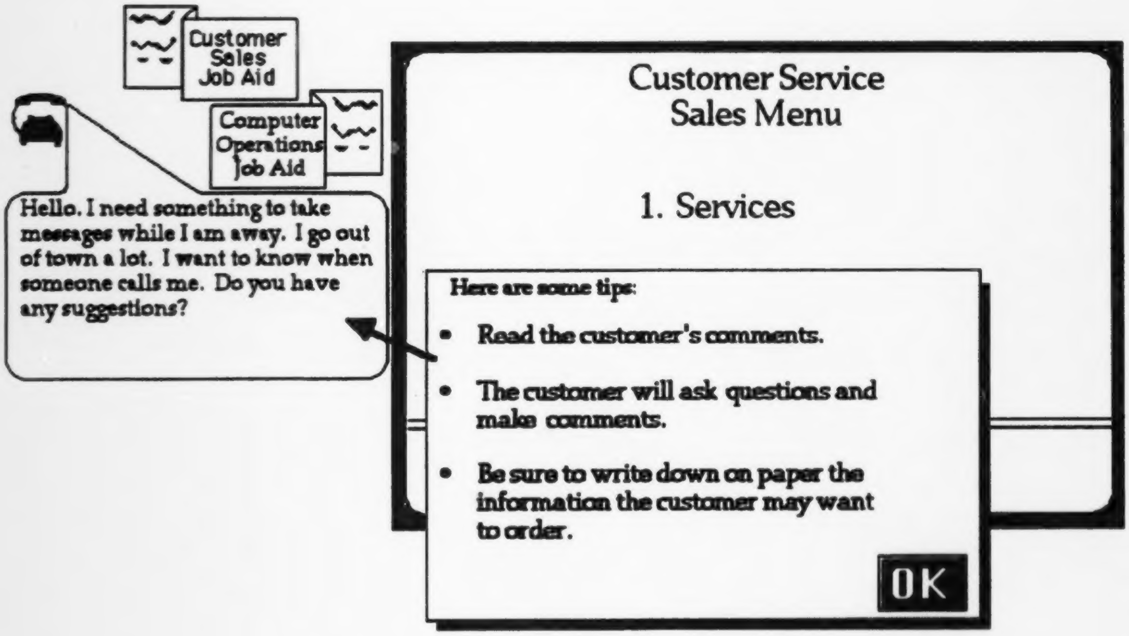

Customer Sales Job Aid
Computer Operations Job Aid
F1-Help
F3- Exit

Customer Service System Selection Menu

1. Telephone # Lookup
2. Billing
3. Sales

Enter the number of your choice.

At this point, the telephone rings and a customer requests some help from the learners.


Customer Sales Job Aid
Computer Operations Job Aid
OK

Hello. I need something to take messages while I am away. I go out of town a lot. I want to know when someone calls me. Do you have any suggestions?

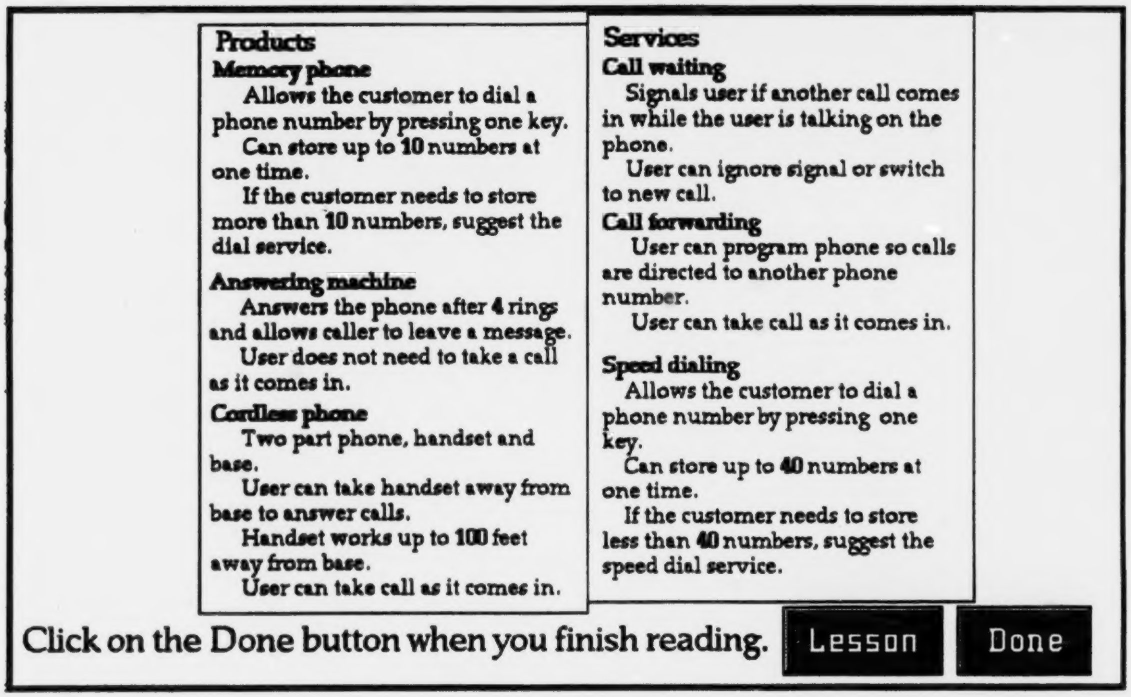
Customer Service Sales Menu

1. Services

Here are some tips:

- **Read the customer's comments.**
- **The customer will ask questions and make comments.**
- **Be sure to write down on paper the information the customer may want to order.**

The computer prompts learners through the decision-making process. Learners should refer to the Customer Sales Job Aid for help in answering these questions. To do this, learners first click on the **Look At** button and then on the job aid.



Products

Memory phone

Allows the customer to dial a phone number by pressing one key.

Can store up to 10 numbers at one time.

If the customer needs to store more than 10 numbers, suggest the dial service.

Answering machine

Answers the phone after 4 rings and allows caller to leave a message.

User does not need to take a call as it comes in.

Cordless phone

Two part phone, handset and base.

User can take handset away from base to answer calls.

Handset works up to 100 feet away from base.

User can take call as it comes in.

Services

Call waiting

Signals user if another call comes in while the user is talking on the phone.

User can ignore signal or switch to new call.

Call forwarding

User can program phone so calls are directed to another phone number.

User can take call as it comes in.

Speed dialing

Allows the customer to dial a phone number by pressing one key.

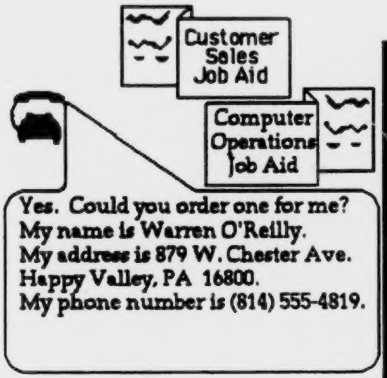
Can store up to 40 numbers at one time.

If the customer needs to store less than 40 numbers, suggest the speed dial service.

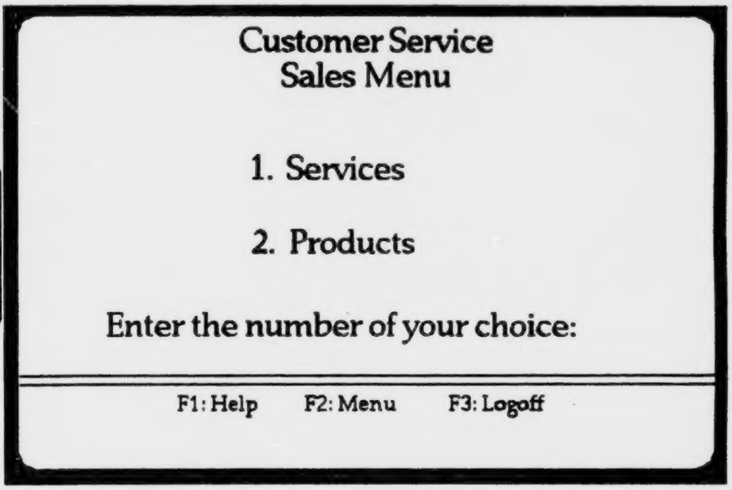
Click on the Done button when you finish reading.

Learners need to use this job aid often. Learners should be encouraged to take notes about this job aid.

After learners interact with the customer and determine the customer's needs, they need to enter the correct information into the computer.


Customer Sales Job Aid
Computer Operations Job Aid
Yes. Could you order one for me? My name is Warren O'Reilly. My address is 879 W. Chester Ave. Happy Valley, PA 16800. My phone number is (814) 555-4819.

Now use the computer to enter information about the customer and then process the customer's order.



Customer Service
Sales Menu

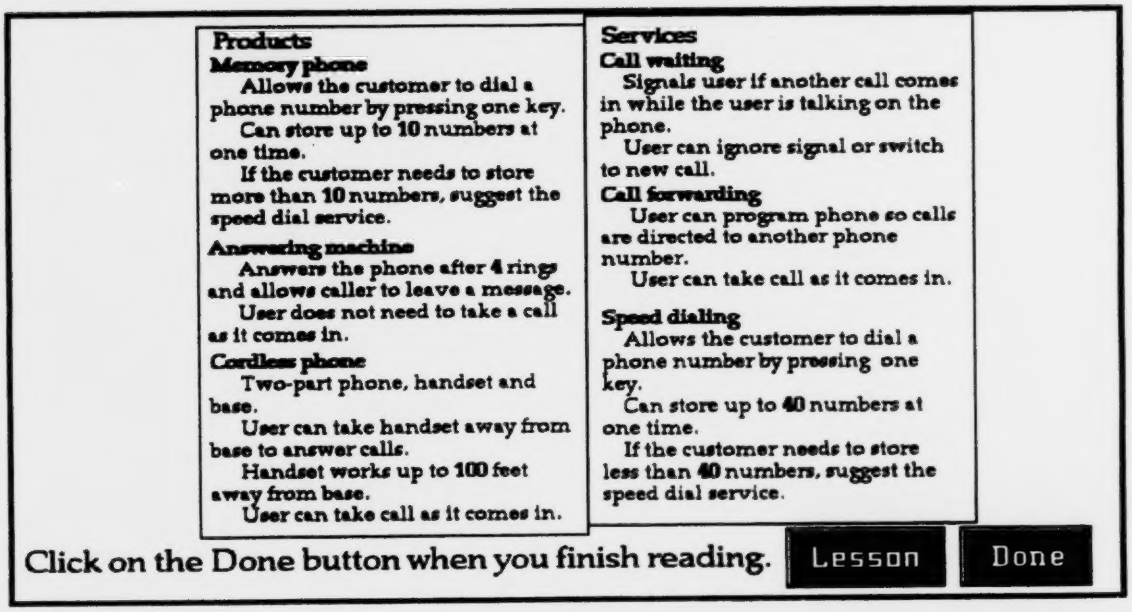
1. Services

2. Products

Enter the number of your choice:

F1: Help
F2: Menu
F3: Logoff

The Customer Sales Job Aid will help with this decision. In this example, the customer wants to order an answering machine.



Products

Memory phone

Allows the customer to dial a phone number by pressing one key.

Can store up to 10 numbers at one time.

If the customer needs to store more than 10 numbers, suggest the speed dial service.

Answering machine

Answers the phone after 4 rings and allows caller to leave a message.

User does not need to take a call as it comes in.

Cordless phone

Two-part phone, handset and base.

User can take handset away from base to answer calls.

Handset works up to 100 feet away from base.

User can take call as it comes in.

Services

Call waiting

Signals user if another call comes in while the user is talking on the phone.

User can ignore signal or switch to new call.

Call forwarding

User can program phone so calls are directed to another phone number.

User can take call as it comes in.

Speed dialing

Allows the customer to dial a phone number by pressing one key.

Can store up to 40 numbers at one time.

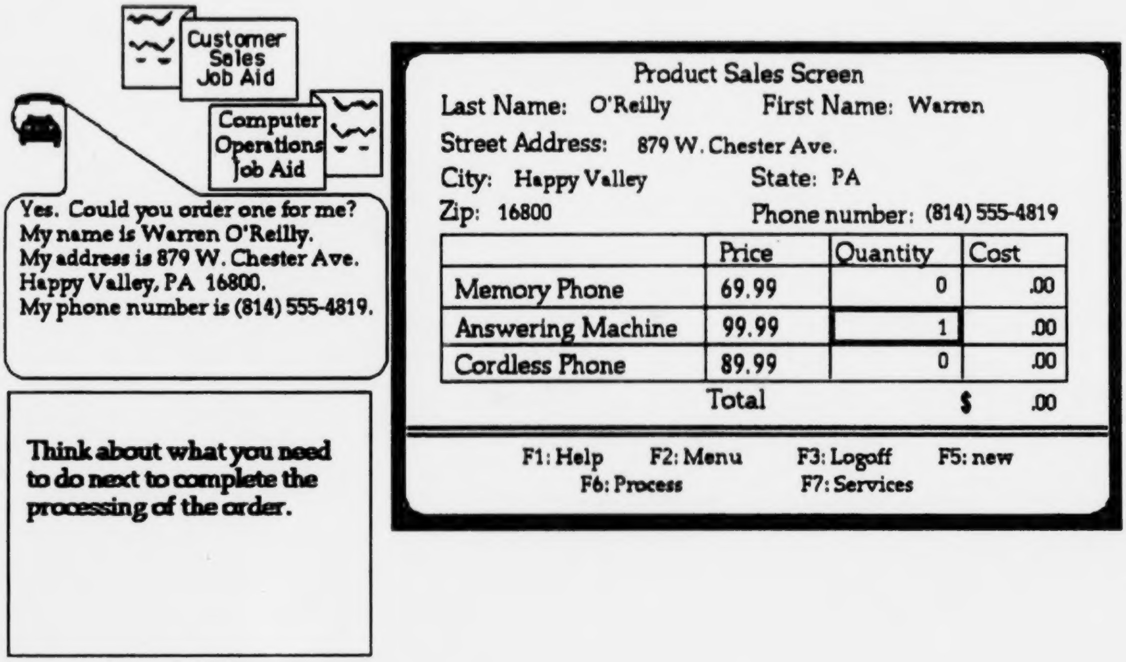
If the customer needs to store less than 40 numbers, suggest the speed dial service.

Click on the Done button when you finish reading.

Learners use the customer information to complete the appropriate screen. The computer will prompt learners through the process.

The method of entering information on these simulated computer screens was designed to mimic a typical system. To enter information in a field, learners press the Tab key until the box is around the desired field. Then learners must press Return or Enter to activate that field. When the blinking vertical bar cursor appears, learners can type information into the field. Learners can also use the Shift-Tab key combination to move backwards to the desired field.

When the learners are within a field, the arrow keys or the mouse will move the blinking vertical bar cursor to the desired position. Pressing the Delete or Backspace key will erase the character immediately to the left of the cursor. Pressing Return or Enter tells the computer to evaluate whatever the learner typed.



Yes. Could you order one for me?
My name is Warren O'Reilly.
My address is 879 W. Chester Ave.
Happy Valley, PA 16800.
My phone number is (814) 555-4819.

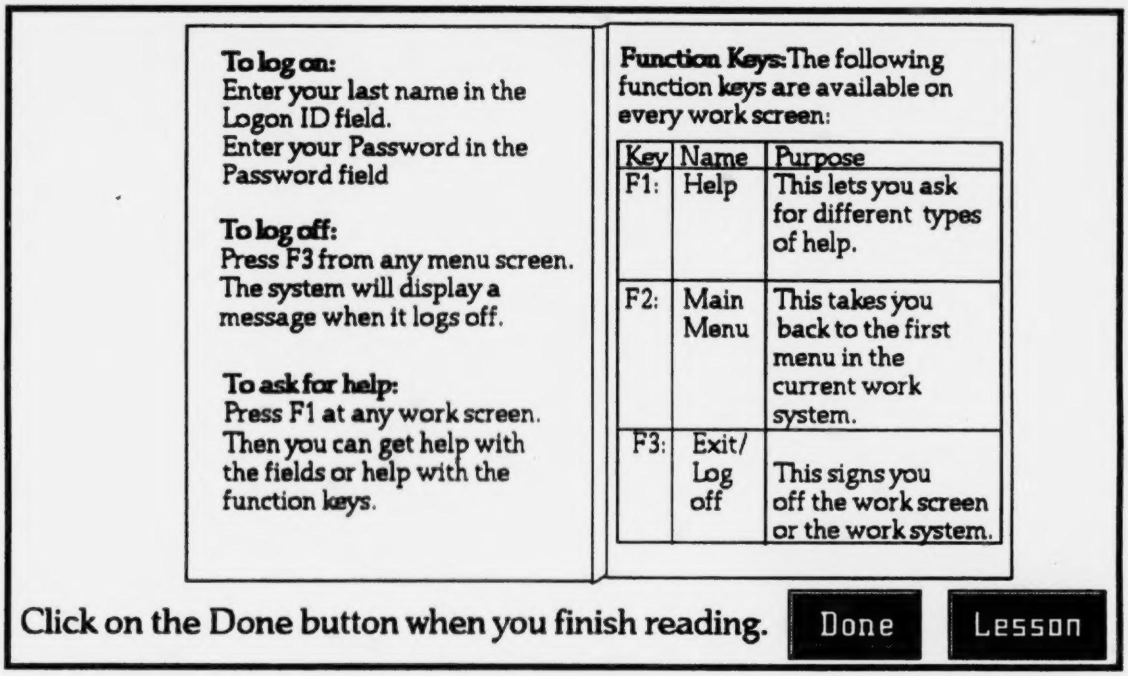
Think about what you need to do next to complete the processing of the order.

Product Sales Screen

Last Name: O'Reilly First Name: Warren
Street Address: 879 W. Chester Ave.
City: Happy Valley State: PA
Zip: 16800 Phone number: (814) 555-4819

	Price	Quantity	Cost
Memory Phone	69.99	0	.00
Answering Machine	99.99	1	.00
Cordless Phone	89.99	0	.00
	Total	$	.00

Learners may look at a Computer Operations Job Aid at any time. The job aid defines the most common procedures on the computer system.



To log on:
Enter your last name in the Logon ID field.
Enter your Password in the Password field

To log off:
Press F3 from any menu screen. The system will display a message when it logs off.

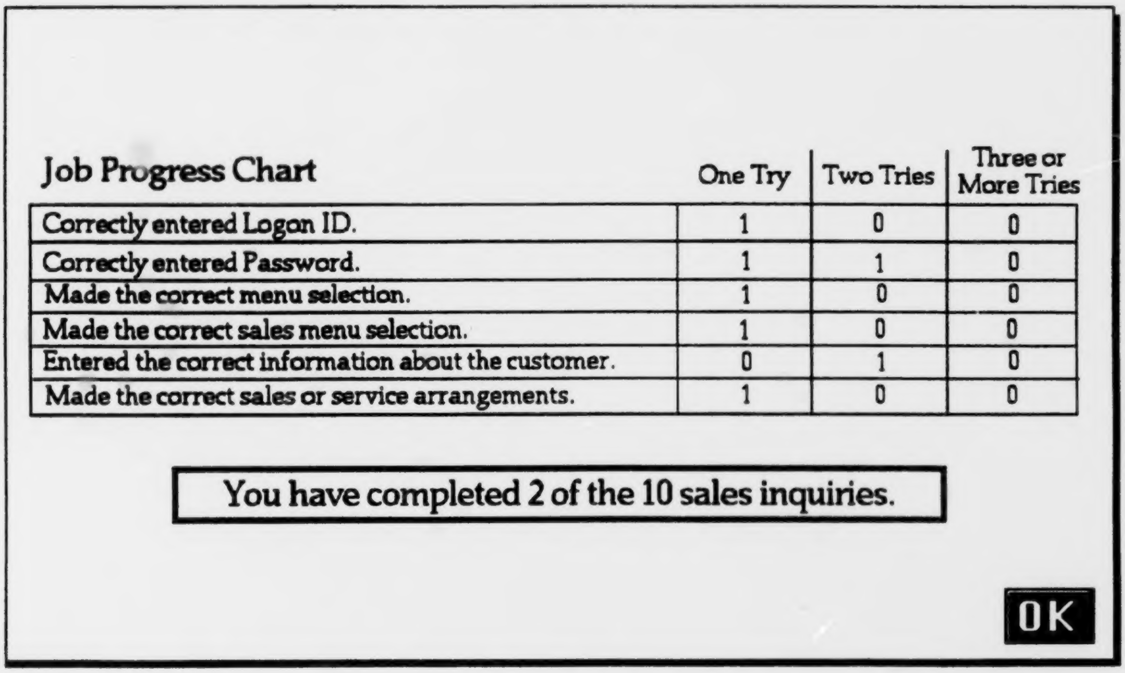
To ask for help:
Press F1 at any work screen. Then you can get help with the fields or help with the function keys.

Function Keys: The following function keys are available on every work screen:

Key	Name	Purpose
F1:	Help	This lets you ask for different types of help.
F2:	Main Menu	This takes you back to the first menu in the current work system.
F3:	Exit/ Log off	This signs you off the work screen or the work system.

Click on the Done button when you finish reading.

After correctly completing the call, learners are shown a Job Progress Chart. This chart tells learners how many tries it took to complete the task correctly. It also indicates how many calls have been completed.



Job Progress Chart

	One Try	Two Tries	Three or More Tries
Correctly entered Logon ID.	1	0	0
Correctly entered Password.	1	1	0
Made the correct menu selection.	1	0	0
Made the correct sales menu selection.	1	0	0
Entered the correct information about the customer.	0	1	0
Made the correct sales or service arrangements.	1	0	0

You have completed 2 of the 10 sales inquiries.

After learners click on **OK**, another customer calls and the process starts over until ten calls are completed. A learner's cumulative progress is recorded each time a call is completed.

Instructional Aids for the Learner:

If the learner needs instruction on any aspect of the scenario, he or she can click on the **Learn About** button at any time. This will bring up a menu of lesson choices.

If the learner is uncertain about the necessary steps or the proper sequence of steps needed to complete a task, he or she can click on the **Job** button. The **Job** button lists the steps (in sequence) the learner must perform to accomplish the task.

If the learner is not sure what kind of help is needed, the **Panic** button will ask a series of questions designed to help the learner focus on the task at hand.

S.C.O.R.E.

Sales and Customer Service
Occupational Readiness Education

VOCABULARY MASTER

S.C.O.R.E. 1994

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AT&T—PROPRIETARY (RESTRICTED)
Solely for authorized persons having a need to know
pursuant to Company Instructions

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Macintosh System Requirements

Macintosh Hardware

This software requires the following hardware components:

- Macintosh Plus or better
- a hard disk drive (2 MB needed for the software)
- a mouse
- one floppy drive (either 400K, 800K, or 1.4 MB)
- 2 MB RAM (4 MB required for System 7)
- a printer (optional, but recommended)

You must have at least one floppy drive for the Learner Data Disk. All learners have a Learner Data Disk where their records are stored. You can create a Learner Data Disk by initializing a blank disk and naming it A.

Your computer must have 2 MB (Megabytes) of RAM (Random Access Memory) installed. If it does not, the software will behave erratically and frequently not work at all. Four MB of RAM are recommended for the best performance. On machines with only 2 MB RAM, it may be necessary to remove all INIT programs. INIT programs run when your computer starts and add features (like sounds, screen savers, etc.) the Macintosh normally does not have. Some of these INITs take a great deal of RAM to run, and thus they may interfere with the software.

A printer is optional, but you will need one if you plan to print any of the learner information kept on the Learner Data Disk. Most learners will request a printout of their work. You may require printed data for your own records. A computer without a printer is like a car without tires.

Macintosh Software

In addition to the software that comes with the *Vocabulary Master* program, the following software is required:

- Apple System Software 6.0.7 or better

System software comes with your computer when you purchase it. To check your computer to see which version of system software you have, select the About the Finder... choice from the Apple Menu when you are at the Finder (also called Desktop) Screen. You may have to update your system software to run this software. If so, contact your local Apple dealer for details.

The software runs more smoothly on computers with faster clock speeds. (If you don't know what that is—just remember—the faster the clock speed the better.) The Mac SE/30 and Mac II line have a faster clock speed than the Mac Plus, Classic, or SE. If you have not yet purchased your equipment, keep this in mind.

PC System Requirements

PC Hardware

This software requires the following hardware components.

One of the following computers:

- A 100% IBM-compatible clone
    - 80386 or 80386SX (80486 strongly recommended)
    - 20 MHz clock speed (20+ MHz strongly recommended)
    - 2 MB RAM (4 MB RAM strongly recommended)

The following graphics adapter:

- 16 color VGA or better

- a monitor (monochrome or color, color recommended)

- a hard disk drive (2 MB needed for the software)
    - 30 msec. access time or less recommended

- a mouse

- one floppy drive (either 360K, 720K, or 1.44 MB)

- printer (optional, but recommended)

To see graphics on your computer, you must have a graphics adapter installed. In older machines, this option was installed manually. Most newer machines come with some type of graphics adapter built-in. This software operates in VGA mode.

A color monitor or screen is recommended. Many educational and business software programs are more aesthetically pleasing in color. The software uses color to enhance backgrounds.

A hard disk drive is a storage device equivalent to many floppy disks in capacity. A hard disk allows you to copy all the information from the floppy disks you received with this software onto it. Once you copy information from the floppy disks to the hard disk, the program is easier to access and manage.

A mouse is an alternative to the keyboard. Traditionally, learners needed the keyboard to interact with computer software. This was difficult for learners with little or no keyboarding skills. It also broke their concentration by forcing them to look at the screen, hunt and peck on the keyboard, and look back at the screen. The mouse is a hand-held device that you roll around on the table. As you do, a corresponding pointer moves about on the computer screen. You roll the mouse around until the pointer is where you want it and then press a button on the mouse to perform some action. Your eyes never have to leave the screen. This software will not work without a mouse.

You must have at least one floppy drive for the Learner Data Disk. All learners have a Learner Data Disk upon which their records are stored. You can create a Learner Data Disk by initializing a blank disk.

Your computer must have 2 MB (Megabytes) of RAM (Random Access Memory) installed. If it does not, the software will behave erratically and frequently will not work at all. We recommend 4 MB of RAM; this will prevent any out-of-memory conflicts.

A printer is optional, but you will need one if you have any desire to print any of the learner information kept on the Learner Data Disk. A computer without a printer is like a car without tires.

PC Software

In addition to the software that comes with the *Vocabulary Master* program, the program requires the following software for successful use:

- IBM DOS 3.3 or greater

The software requires IBM DOS (Disk Operating System) to work. DOS is also called MS-DOS (Microsoft Disk Operating System) after the company that created and markets it. DOS is not included with the software; it must be purchased separately. If you do not have DOS, you must obtain it before you can do anything else. Most commercial software requires DOS to function.

NOTE: You should avoid DOS 4.0. DOS 4.0 has several undesirable features. We recommend DOS 5.0 or higher.

- Windows 3.1 or better

The software requires Windows 3.1 to run. Windows is shipped with most new computers, and is available at a reasonable cost.

Macintosh Install Procedure

Hardware

Your computer should be up and running at this time. See the "System Requirements" section if you have any questions about your hardware. Please check to make sure that your hard disk and monitor are functioning correctly before you continue. You do not need to make any special adjustments to your computer to use this software.

Software

The disks you received are your master set. You may wish to make a backup copy of the master set at this time. You are entitled to make one backup of this software for archival purposes. This is optional and the choice is yours. If you make a backup set, use it for the procedures on the following pages. Put the original master set aside in a safe place.

You cannot run the software directly off the floppy disks you received with this software. You must copy the software onto your hard disk first and then run it from the hard disk.

Certain INITs and CDEVs (software add-ons that give your system capabilities it wouldn't normally possess) may cause problems with the install program and/or the software itself. INITs and CDEVs are always located within the System folder on your hard disk. You can deactivate these INITs and CDEVs temporarily by dragging them out of the System folder onto your desktop and restarting your computer. After you install this program, you can reactivate them by dragging them back into the System folder and restarting your computer.

NOTE: In System 7, these files are probably located in the Extensions folder within your System folder.

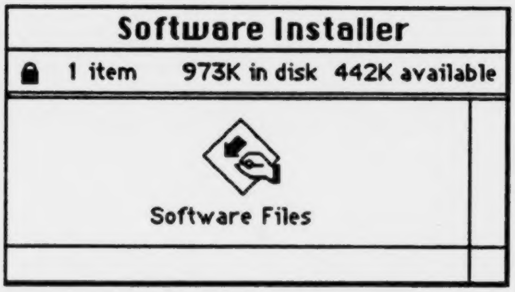
INITs and CDEVs also take memory (RAM) away from the computer. If you are using a machine that has several Megabytes of RAM this will not present a problem. If you are using a machine that has less than two Megabytes of memory you may experience difficulties running this software. If this occurs, you should remove all nonessential INITs and CDEVs from your System folder.

The following pages will guide you through the installation process.

1. **Turn on your computer and allow it to warm up. Also, turn on the monitor and any self-powered disk drives.**

2. **Insert the *S.C.O.R.E. Vocabulary Master* disk into the floppy drive.**

3. **Double-click on the software icon.**

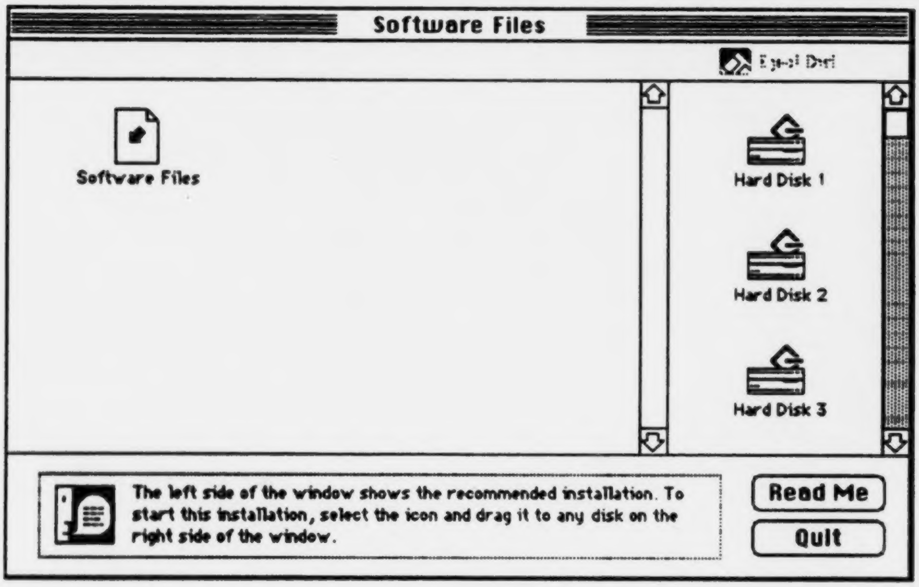

Software Installer
1 item
973K in disk
442K available
Software Files

Move the screen pointer on top of the software icon by moving the mouse about. Press and release the mouse button two times quickly.

4. **A Banner Screen will appear. Click the mouse to go on.**

5. **When this screen appears, drag the file icon on the left to the appropriate hard drive on the right. The installation will begin.**

When the installation is complete, quit the program by clicking on the **Quit** button.


Software Files
Software Files
Hard Disk 1
Hard Disk 2
Hard Disk 3
Read Me
Quit

The left side of the window shows the recommended installation. To start this installation, select the icon and drag it to any disk on the right side of the window.

If you ever need to remove the software from your hard disk, drag the software folder into the Trash Can.

PC Install Procedure

Hardware

Your computer should be up and running at this time. DOS and Windows must be installed on your hard disk. See the "System Requirements" section if you have any questions about your hardware. Please check to make sure that your hard disk and monitor are functioning correctly before you proceed. You do not need to make any special adjustments to your computer to use this software.

Software

The disks you received are your master set. You may wish to make a backup copy of the master set at this time. You are entitled to make one backup of this software for archival purposes. This is optional and the choice is yours. If you make a backup set, use it for the procedures on the following pages. Put the original master set aside in a safe place.

You cannot run the software directly off the floppy disks you received with this software. You must copy the software onto your hard disk first and then run it from the hard disk. This procedure normally can cause many problems if you lack expertise, but the provided installation program takes care of 90 percent of the dirty work.

The following pages will guide you through the installation process.

1. **Turn on the computer and start Windows.**

   You should allow at least one minute for it to warm up and run any self-tests it does. Make sure the monitor and any self-powered disk drives are turned on as well!

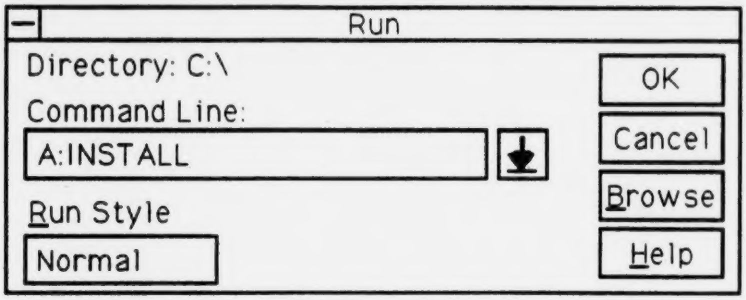
2. **Insert the *S.C.O.R.E. Vocabulary Master* disk into the floppy drive.**

   Insert the disk into the floppy drive. If you have more than one floppy drive, insert it in drive A:. If you don't know which drive is drive A:, consult your computer manual.

HINT: The drive that lights up or makes noise first is usually your A: drive.

3. **Select Run from the File Menu in Windows, type A:INSTALL, then press Enter.**

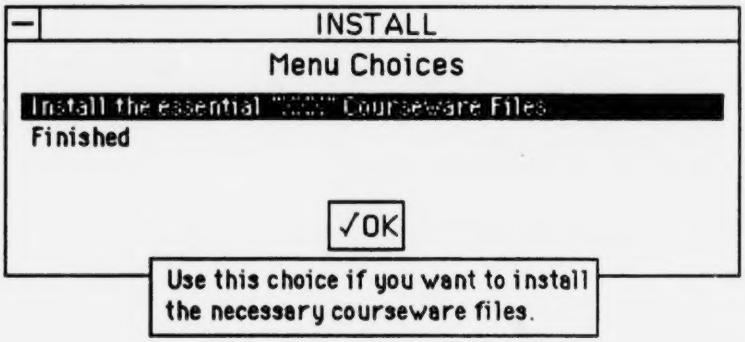
   This tells Windows to run the Install program on the A: drive.



Directory: C:\
Command Line: A:INSTALL
Run Style: Normal

4. **At this point, you may install the software or quit the installation process.**

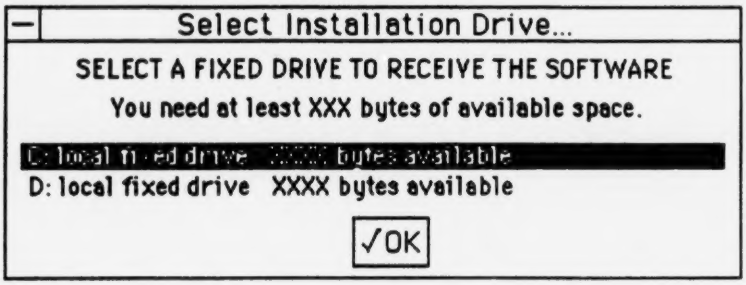
   Use the arrow keys to move the highlighted selection to your choice, then press Enter.



Menu Choices
Install the essential "XXXX" Courseware Files
Finished

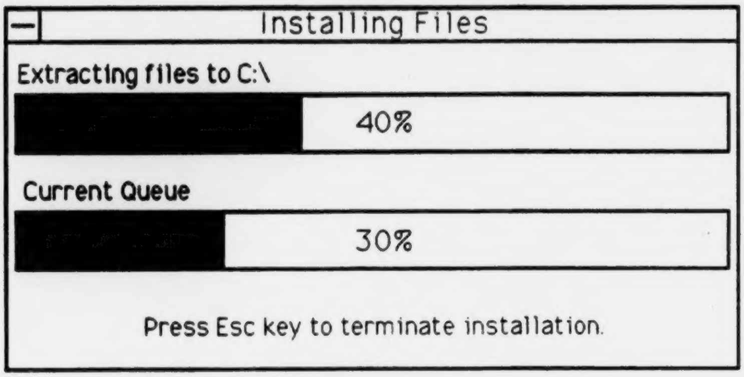
Use this choice if you want to install the necessary courseware files.

5. **You must choose which hard drive (if you have more than one) to install the software on.**



SELECT A FIXED DRIVE TO RECEIVE THE SOFTWARE
You need at least XXX bytes of available space.
C: local fixed drive XXXX bytes available
D: local fixed drive XXXX bytes available

6. **This dialog box shows you the progress of the installation.**



Installing Files

Extracting files to C:\

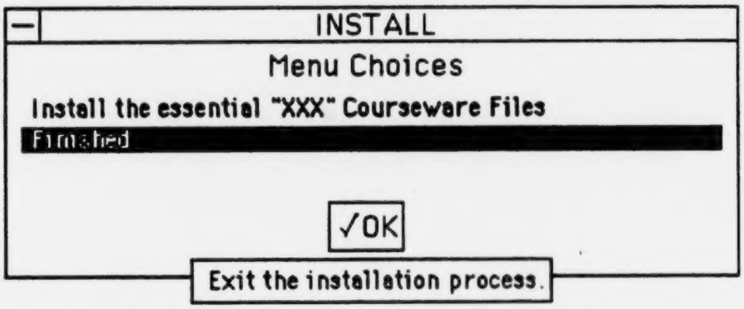
40%

Current Queue

30%

Press Esc key to terminate installation.

7. **When the installation is complete, this dialog box will reappear. Press Enter to exit the installation process.**



INSTALL

Menu Choices

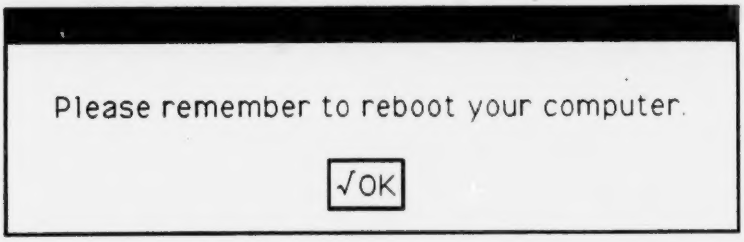
Install the essential "XXX" Courseware Files

Finished

Exit the installation process.

8. **This prompt reminds you to restart your computer.**

The installation has added several fonts and other files needed to run the software correctly. Windows will not recognize these files until you restart your computer and Windows again.



Please remember to reboot your computer.

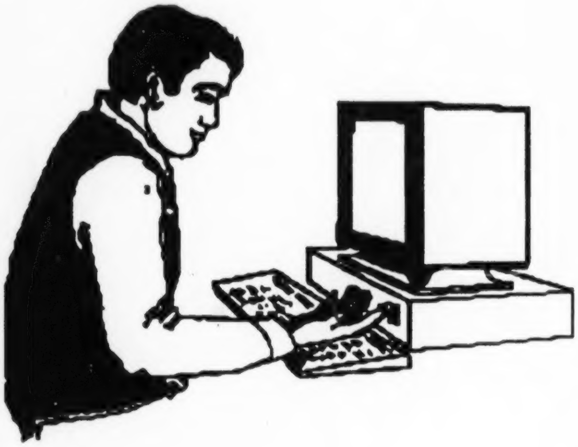
NOTE: You must restart your computer at this point for the software to operate correctly.

9. **A Program Group for the software is now on your desktop. This Program Group contains a Program Item named STARTVM. Double-click on this Program Item (STARTVM) to start the software.**

Starting the Software

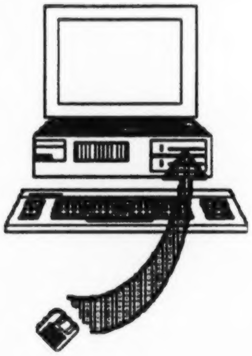
You should have copied the software onto your hard disk before you start this section. If you have not done so, please refer to the "Install" section before continuing!

1. **Turn on the computer.**



You should allow at least one minute for it to warm up and run any self-tests. Turn on the monitor also!

2. **Insert a Learner Data Disk in the floppy drive.**



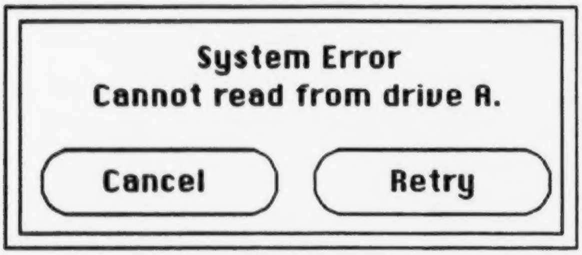
Learners MUST have their own Learner Data Disks. If you have ten learners, you need ten Learner Data Disks. You should take a Learner Data Disk you created and write the learner's name on it. (If you are using a 5.25" disk, use a felt-tip pen so you don't damage the disk!) If you have not created a Learner Data Disk yet, please do so at this time. For the Macintosh, initialize a disk and name it A. For the PC, just initialize a disk.

One of the most wonderful aspects of computers is their ability to keep track of bits and pieces of information. Good software will keep track of virtually everything your learner does. This software keeps records of various things the learner does on a Learner Data Disk. You can check the Learner Data Disks to see what the learners did after they finish using the software. This tutorial explains this in greater detail later.

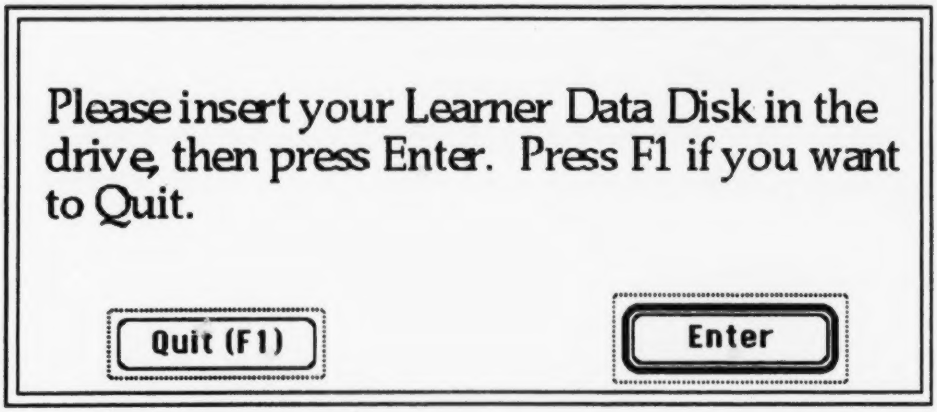
3. **To start the software, locate and open the software folder on your hard drive. Double-click on the Start icon. This starts the software. You will always start at the Main Menu of the software.**

4. **The next several screens are the introductory screens. You need not do anything here.**

5. **One of these screens will appear if you do not have the Learner Data Disk in the floppy drive.**



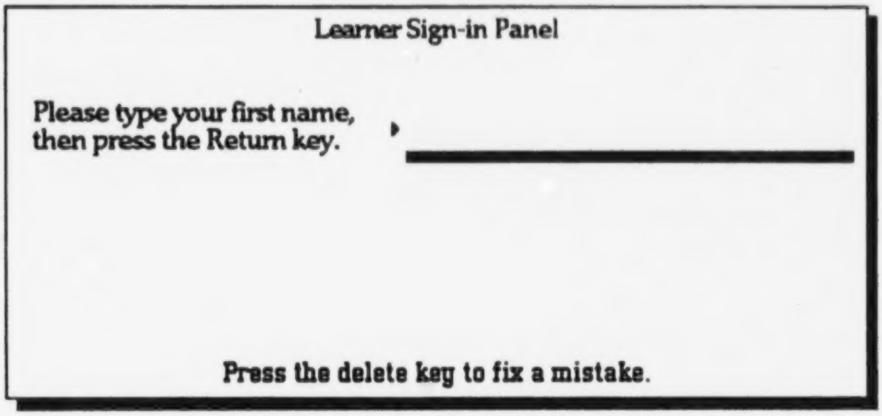
System Error
Cannot read from drive A.



Please insert your Learner Data Disk in the drive, then press Enter. Press F1 if you want to Quit.

You must put a Learner Data Disk in the floppy drive and click on the **Retry** or **Enter** button. You cannot proceed beyond this point without a Learner Data Disk. The software will not function without a Learner Data Disk in the floppy drive at all times.

6a. This is the initial Learner Sign-in Panel.



Learner Sign-in Panel

Please type your first name, then press the Return key.

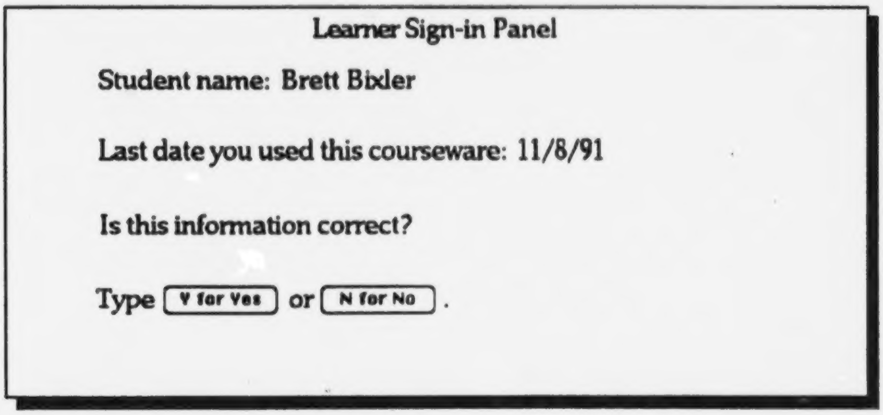
Press the delete key to fix a mistake.

Type in the data.

This panel appears only the first time a learner uses the software, or you choose to edit the learner name. Answer the questions, pressing the Enter key after each response. Use the Delete key to erase a mistake.

NOTE: The first name and last name are typed on separate lines. Type the first name and press Return or Enter. Type the second name and press Return or Enter.

6b. This is the normal Learner Sign-in Panel that will appear after the learner's information is entered.



Learner Sign-in Panel

Student name: Brett Bixler

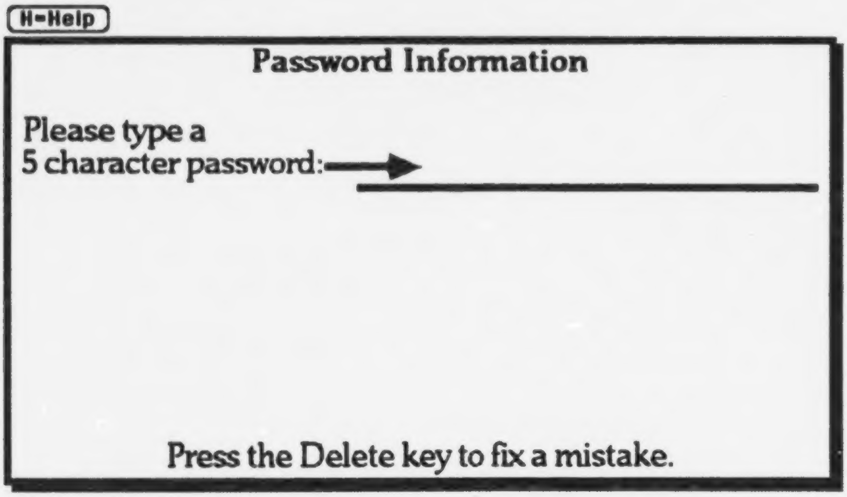
Last date you used this courseware: 11/8/91

Is this information correct?

Type Y for Yes or N for No .

Type a Y if the information is right. If you wish to change the information on the Learner Data Disk, type N. This is the sign-in panel that you will see most often. It automatically appears in the learner's second and subsequent sessions with the software. Answer the question with a Y (for yes) or N (for no). If this is the correct Learner Data Disk, type a Y. If it is not the correct disk, type an N. If you type N, the program presents another screen that allows you three choices. You may edit the data (type E), erase and reuse the data disk (type X), or eject the Learner Data Disk and insert one for a different learner (type T). You may edit the learner name if there is an error of some sort in the learner's information (this will take you to the initial Learner Sign-in Panel), erase all information from the Learner Data Disk (useful if you want to reuse a disk), or switch Learner Data Disks (in case you put the wrong one in by accident). If you want to switch disks, you must exit the software and start it again.

7a. This screen will appear the first time a learner uses the software.



H-Help

Password Information

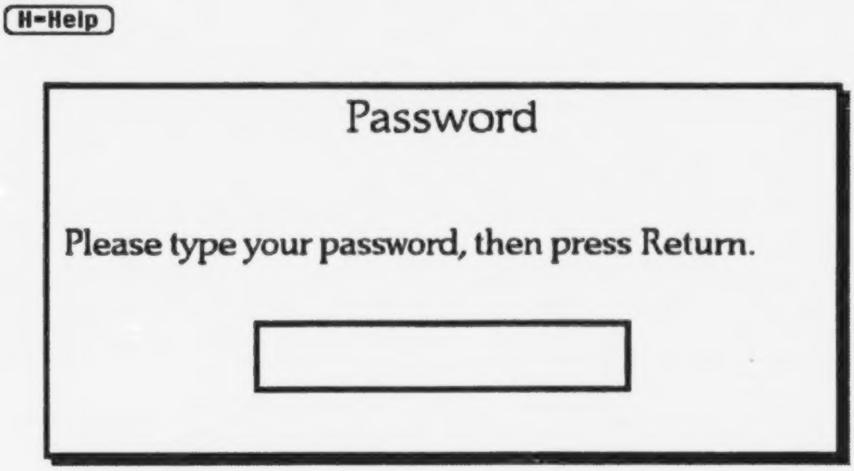
Please type a
5 character password: →

Press the Delete key to fix a mistake.

The learner must type a five-character password. The password ensures no one else can use their Learner Data Disk. The password must be five characters in length and will not appear on the screen. The password is sensitive to upper and lower case letters and symbols. If the learner wants to change the password at a later date, he or she can change it at the Main Menu, using the Learner pull-down Menu.

After the learner types a password, the computer will have the learner type it again to be sure it is typed correctly.

7b. The second and subsequent times the learner uses the software, this Password Screen will appear:



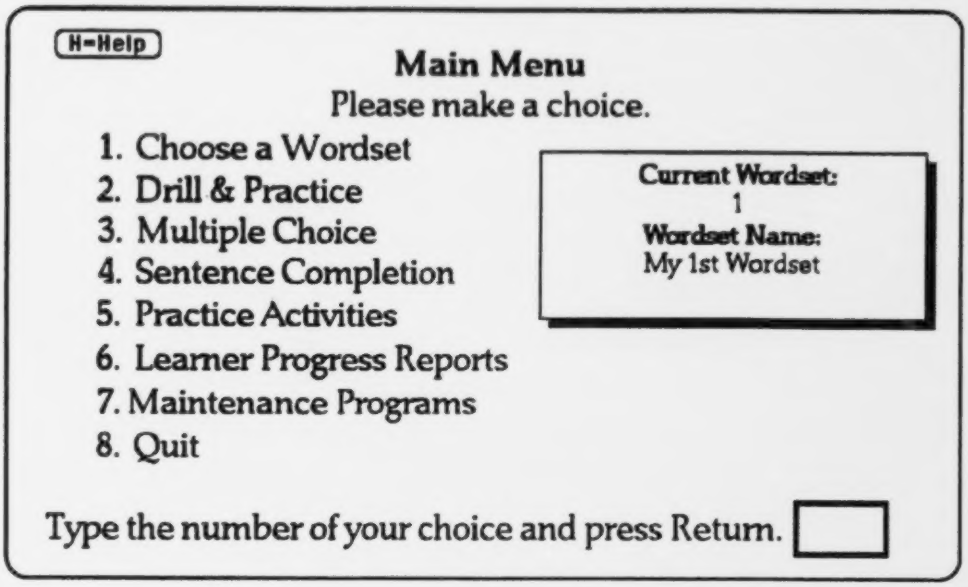
Password

Please type your password, then press Return.

The learner must type his or her password at this time. If the learner forgets the password, he or she cannot enter the program. You will have to use the master password ("Words") to proceed to the Main Menu. Then you can use the Learner pull-down Menu to reenter the learner's password.

Note: The master password ("Words") gives you access to important control features in the program. Use the master password when you want to edit or add a new Wordset, print a Wordset, or adjust the color and sound.

8. **This is the Main Menu:**



Main Menu

Please make a choice.

1. Choose a Wordset
2. Drill & Practice
3. Multiple Choice
4. Sentence Completion
5. Practice Activities
6. Learner Progress Reports
7. Maintenance Programs
8. Quit

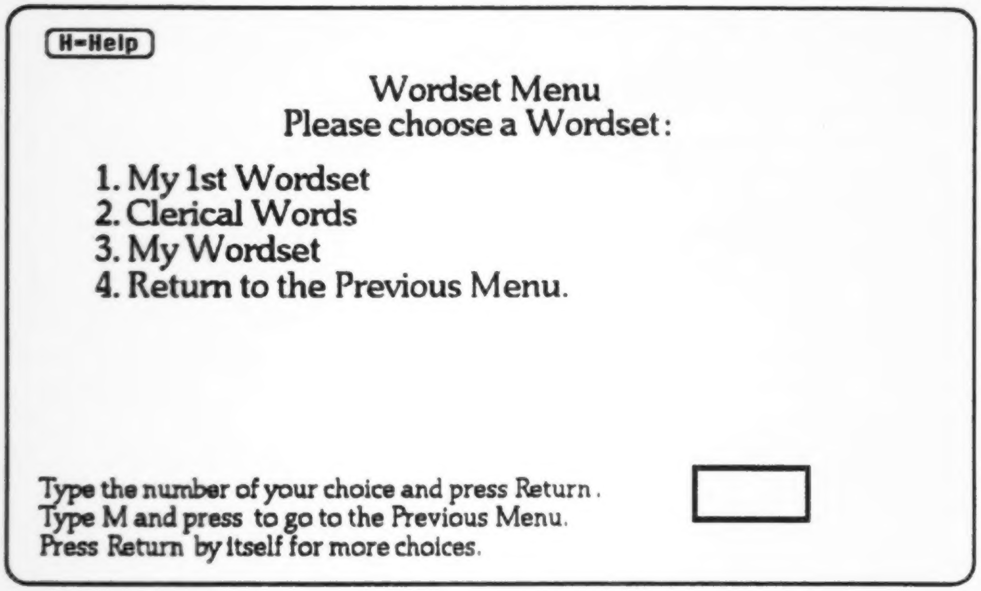
Current Wordset:
1
Wordset Name:
My 1st Wordset

Type the number of your choice and press Return.

Click on or type the number of your choice. Each selection is explained in the following sections.

Choose a Wordset

When you select **Choose a Wordset** from the Main Menu, this screen will appear with the Wordsets currently available:



Wordset Menu
Please choose a Wordset:

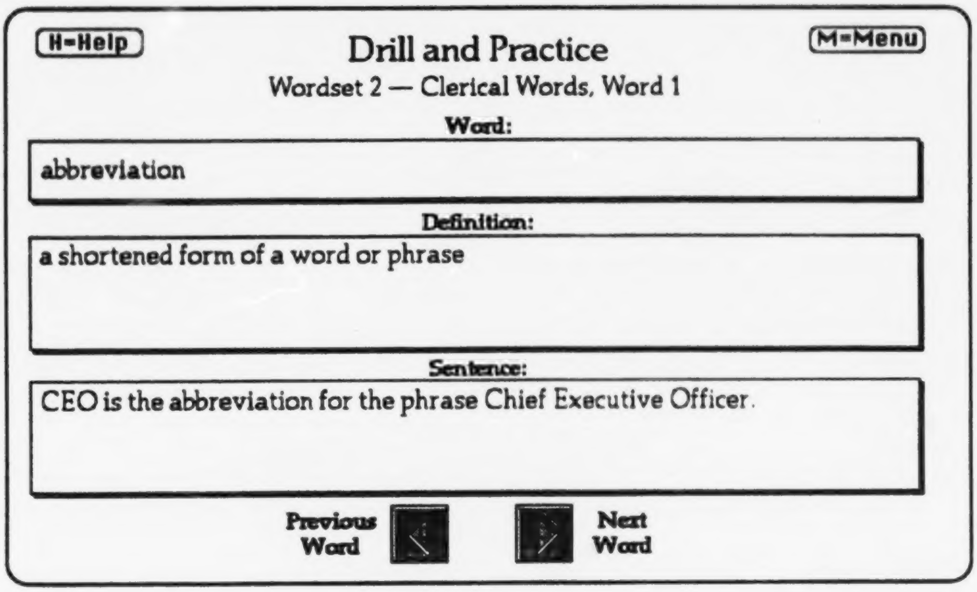
1. My 1st Wordset
2. Clerical Words
3. My Wordset
4. Return to the Previous Menu.

Type the number of your choice and press Return.
Type M and press to go to the Previous Menu.
Press Return by itself for more choices.

Type the number of the Wordset you want to examine. By pressing Return or Enter by itself, you may page through this menu to see more menu choices. After you choose a Wordset, you will automatically return to the Main Menu.

Drill and Practice

When you choose **Drill and Practice** from the Main Menu, a directions screen will appear followed by this screen:



Drill and Practice

Wordset 2 — Clerical Words, Word 1

Word:

abbreviation

Definition:

a shortened form of a word or phrase

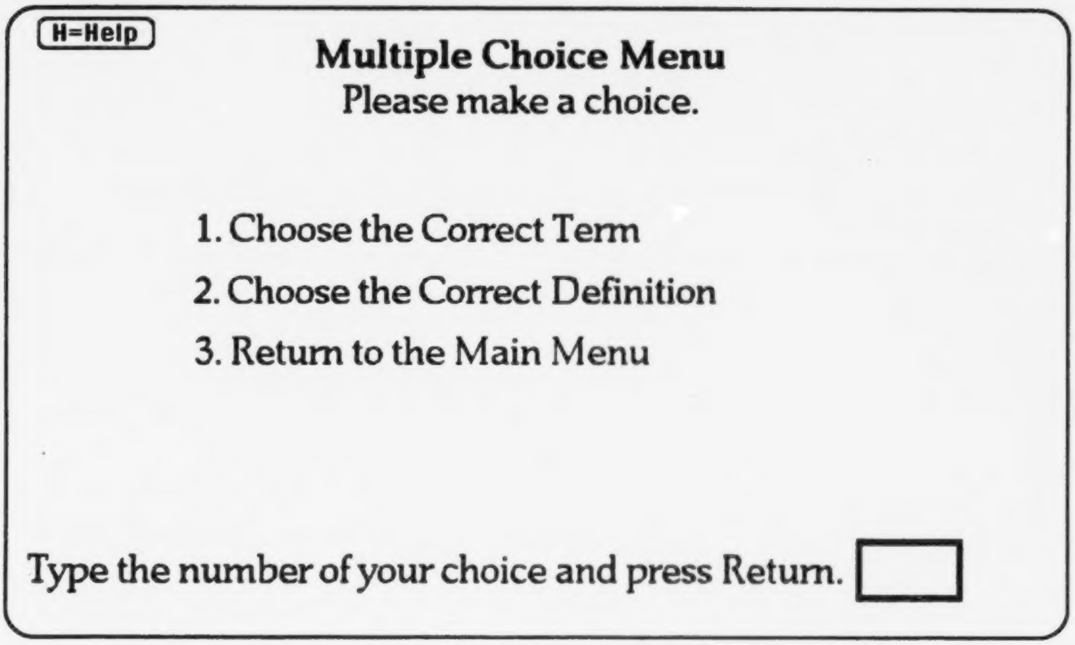
Sentence:

CEO is the abbreviation for the phrase Chief Executive Officer.

You can click on the arrows at the bottom of the screen to page through the Wordset. You can also use the arrow keys on the keyboard. When you are finished with the Wordset, click on the **Menu** button to return to the Main Menu.

Multiple Choice

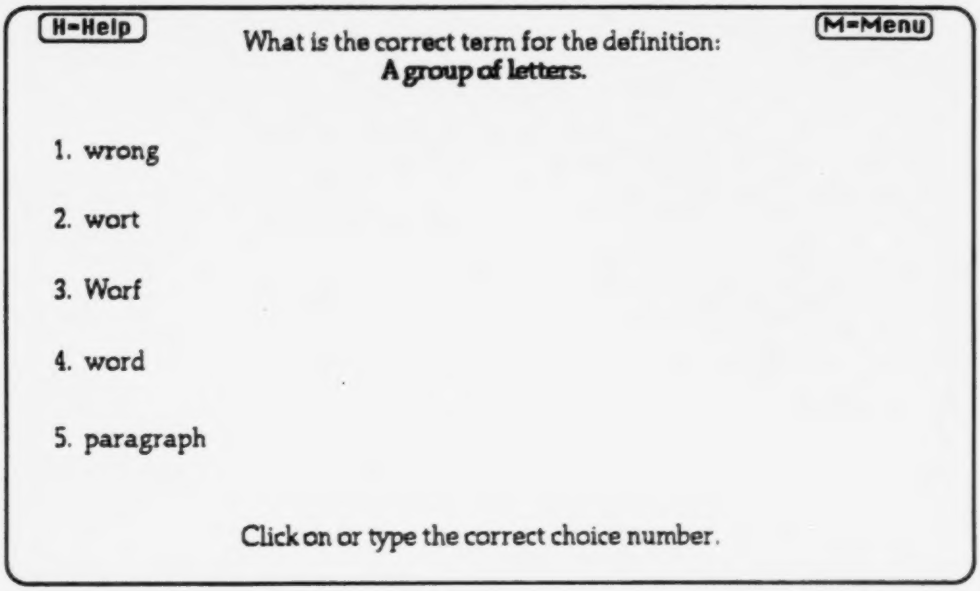
When you choose **Multiple Choice** from the Main Menu, this screen will appear:


H=Help
1. Choose the Correct Term
2. Choose the Correct Definition
3. Return to the Main Menu

Multiple Choice Menu
Please make a choice.

Type the number of your choice and press Return.

There are two multiple choice activities. Type the number of your choice. The first multiple choice activity gives you five terms and one definition. You must match the correct term to the given definition.

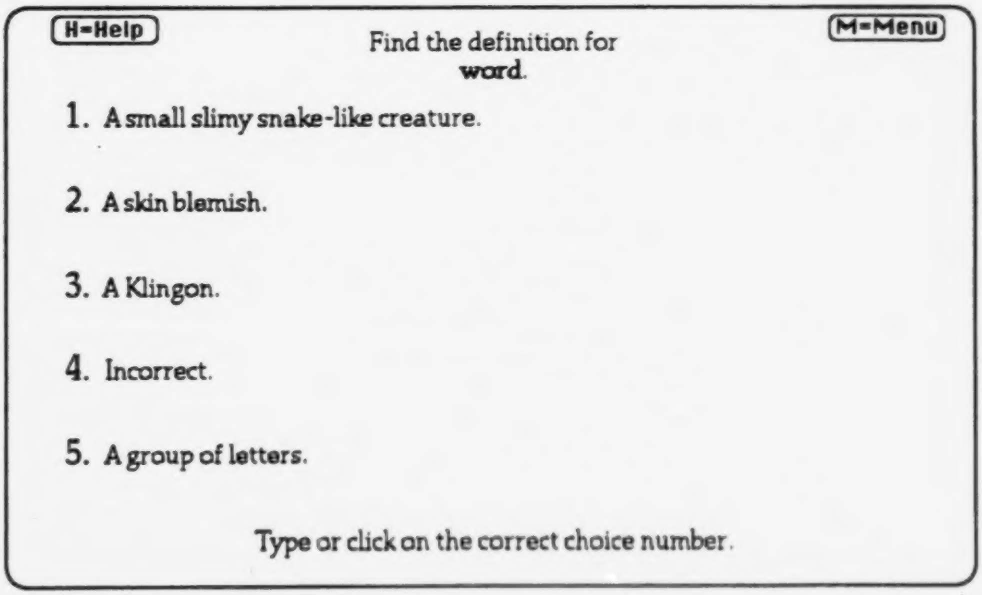


What is the correct term for the definition:
A group of letters.

1. wrong
2. wort
3. Worf
4. word
5. paragraph

Click on or type the correct choice number.

The second activity gives you five definitions and one term. You must match the correct definition to the given term.



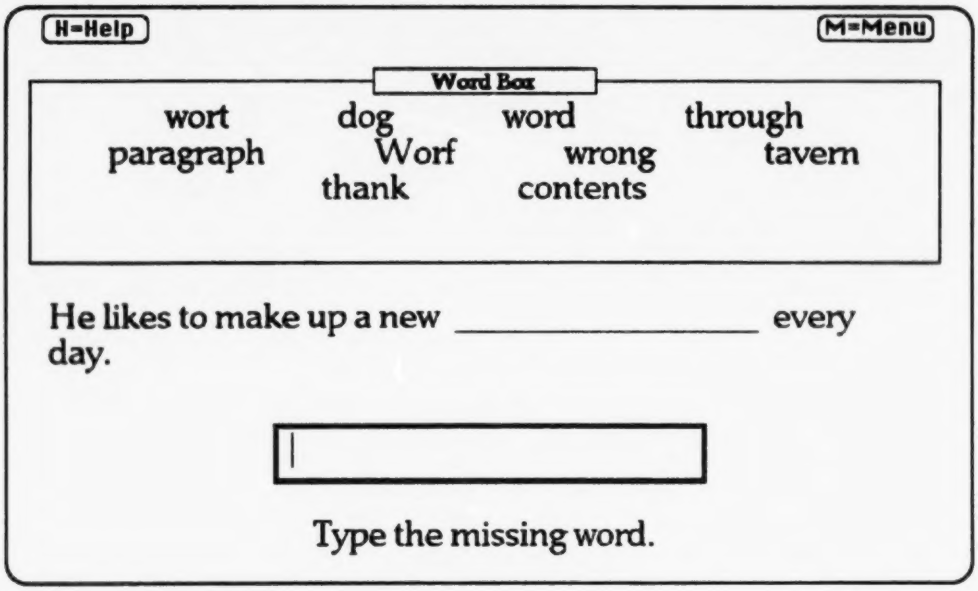
Find the definition for
word.

1. A small slimy snake-like creature.
2. A skin blemish.
3. A Klingon.
4. Incorrect.
5. A group of letters.

Type or click on the correct choice number.

Sentence Completion

When you choose **Completion** from the Main Menu, this screen will appear:



wort dog word through
paragraph Worf wrong tavern
thank contents

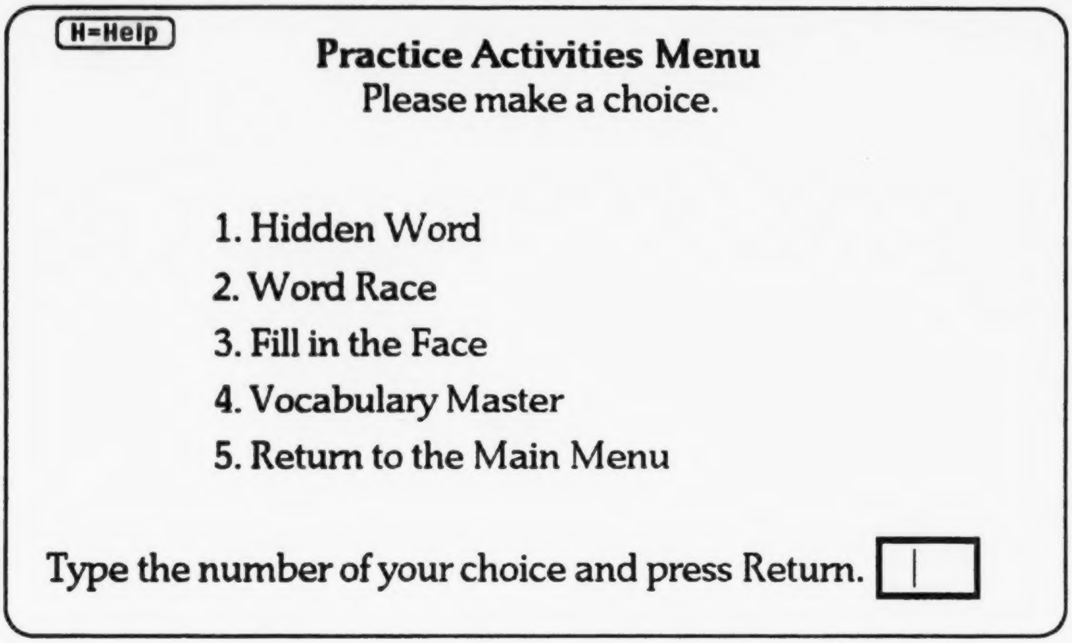
He likes to make up a new ________________ every day.

Type the missing word.

You must choose the correct word to complete the sentence from the Word Box at the top of the screen. The program distinguishes between upper and lower case, spaces, and hyphens in multiple word phrases. The target word must be typed the same way it was taught. You may need to help a first-time user with the Caps Lock key and the Shift key. After you type the word, press the Return or Enter key. Use the Delete or Backspace key to erase a mistake while typing.

Practice Activities

When you choose **Practice Activities** from the Main Menu, this screen will appear:

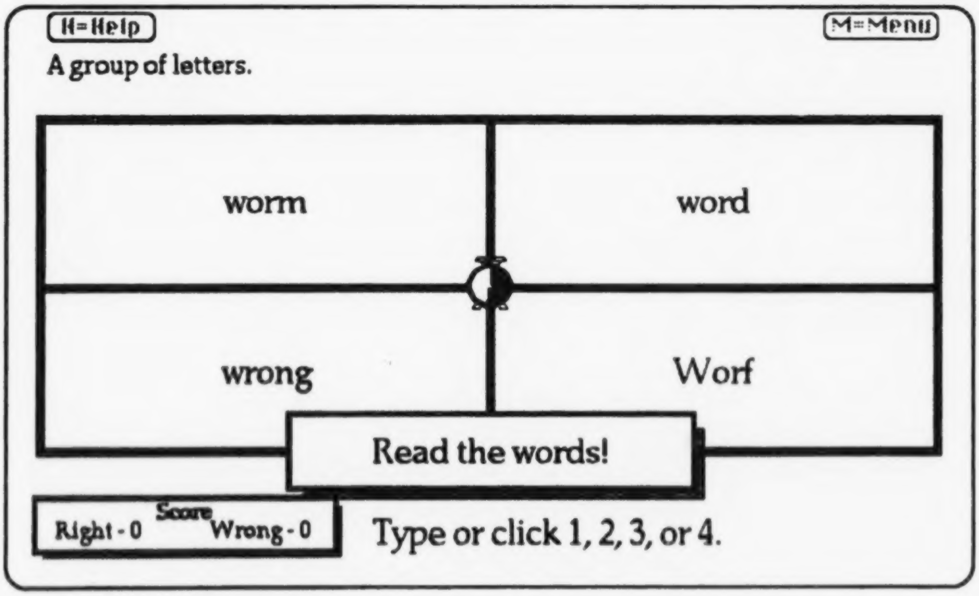


Practice Activities Menu
Please make a choice.

1. Hidden Word
2. Word Race
3. Fill in the Face
4. Vocabulary Master
5. Return to the Main Menu

Type the number of your choice and press Return.

There are four activities to choose from. **Hidden Word** is an activity designed to improve a learner's recognition time. First a definition appears. Then four words appear on the screen for about four seconds.

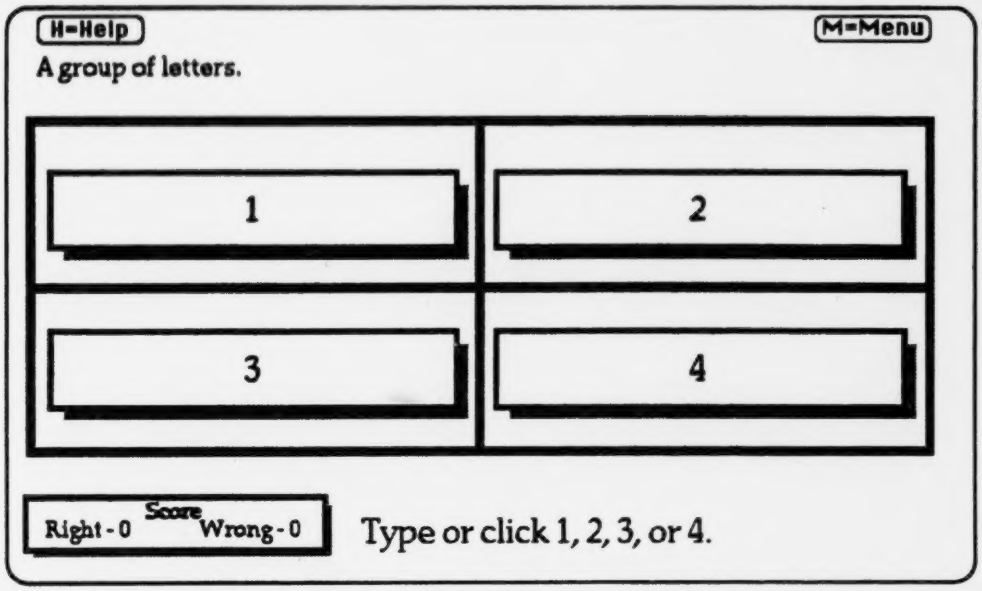


A group of letters.

Read the words!

Type or click 1, 2, 3, or 4.

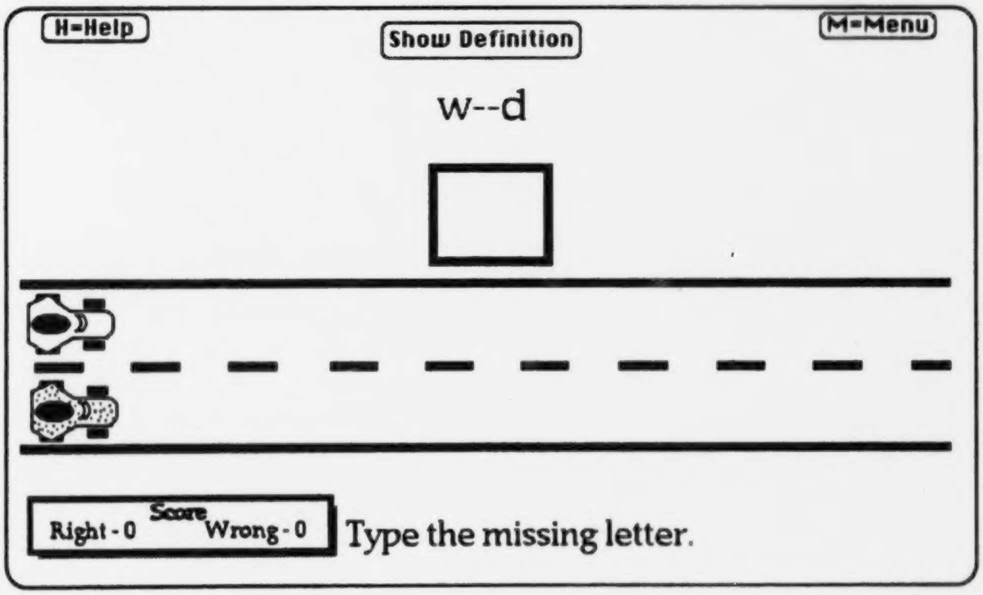
The words are then covered by numbers. The learner must identify the correct term and type the number that covers it.


H=Help
M=Menu
1
2
3
4
Right - 0
Score
Wrong - 0

A group of letters.

Type or click 1, 2, 3, or 4.

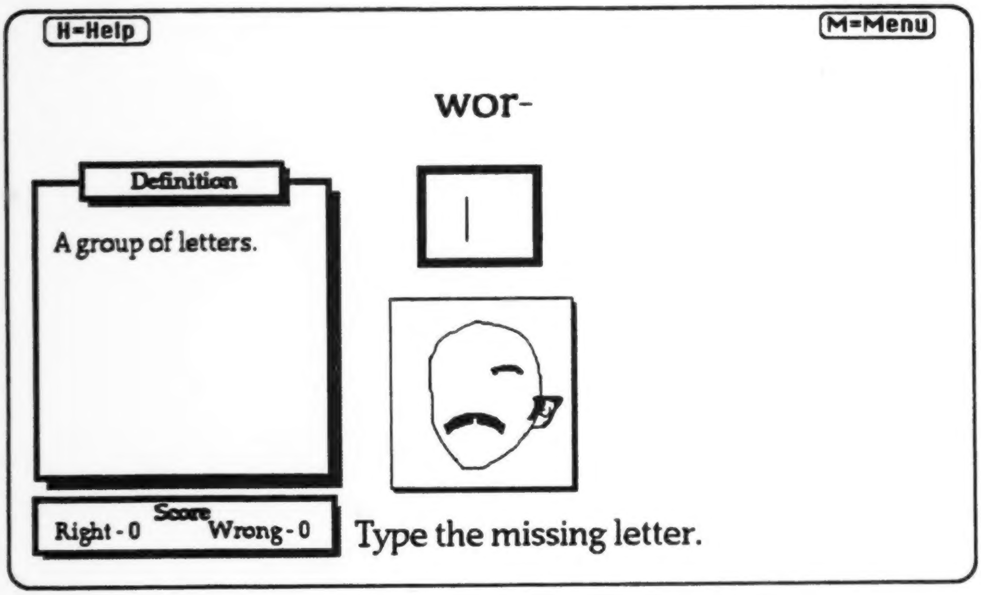
Word Race is an activity designed to increase word recognition. The learner must complete a word or phrase with the missing letters. First the program gives a definition for the word. Then the learner must complete the word by typing the missing letters, spaces, or hyphens. Upper and lower case must be the same as the target word.


H=Help
Show Definition
M=Menu
Right - 0
Score
Wrong - 0

w--d

Type the missing letter.

Fill-in-the-Face is another activity designed to increase word recognition. The learner must complete a word. First the program gives a definition for the word. Then the learner must type the word. The program distinguishes between upper and lower case, spaces, and hyphens in multiple word phrases. The target word must be typed the same way it was taught. You may need to help a first-time user with the Caps Lock key and the Shift key.



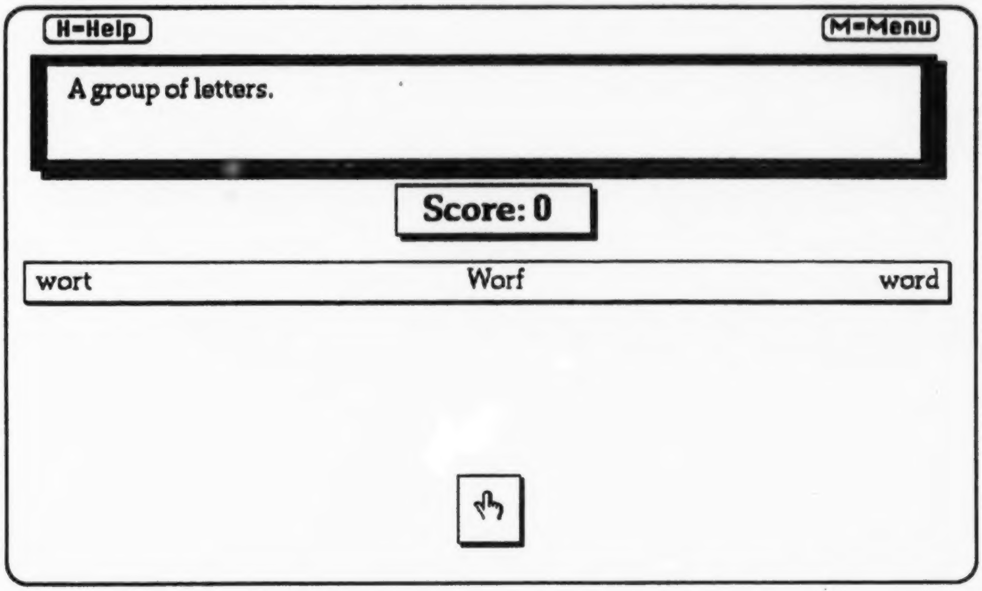
wor-

A group of letters.

Right - 0 Wrong - 0

Type the missing letter.

Vocabulary Master is an activity designed to decrease response time in recognition of terms. The learner presses the space bar to select the correct term. The score reflects the response time of the learner; the quicker the correct response, the higher the score.



A group of letters.

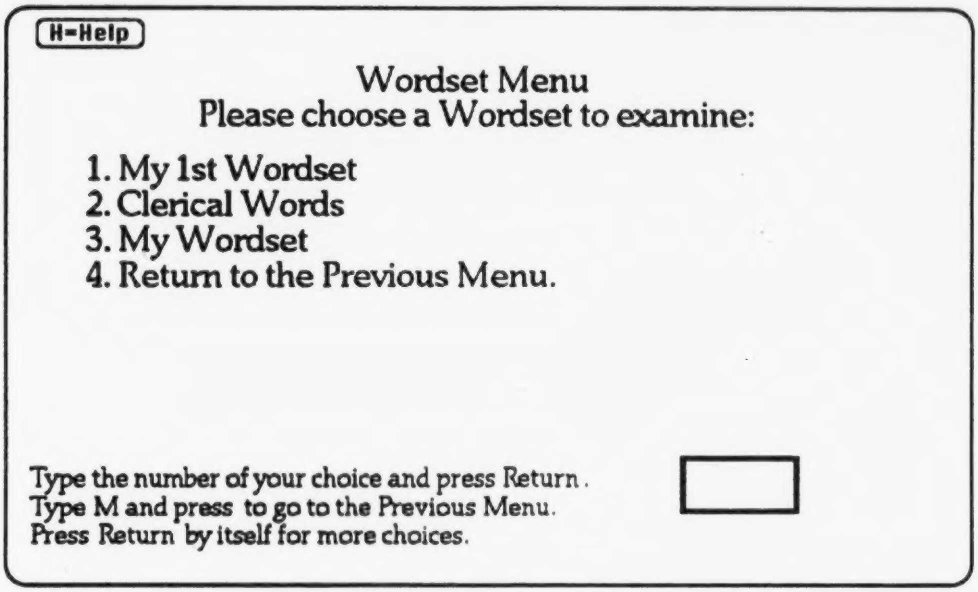
Score: 0

wort Worf word

The *Vocabulary Master* program randomizes practice activities. The learner can use the activities over and over without encountering exactly the same question twice. All practice activities have their own scoreboard that keeps track of the top ten scores.

Learner Progress Reports

When you choose **Learner Progress Reports** from the Main Menu, this screen appears:

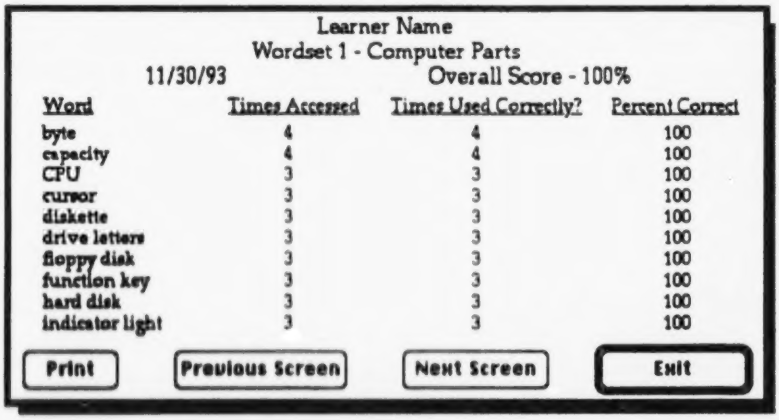


Wordset Menu
Please choose a Wordset to examine:

1. My 1st Wordset
2. Clerical Words
3. My Wordset
4. Return to the Previous Menu.

Type the number of your choice and press Return .
Type M and press to go to the Previous Menu.
Press Return by itself for more choices.

Type the number of the Wordset you want to examine. By pressing Return or Enter by itself you may page through this menu to see more menu choices. After you choose a Wordset, this screen will appear:

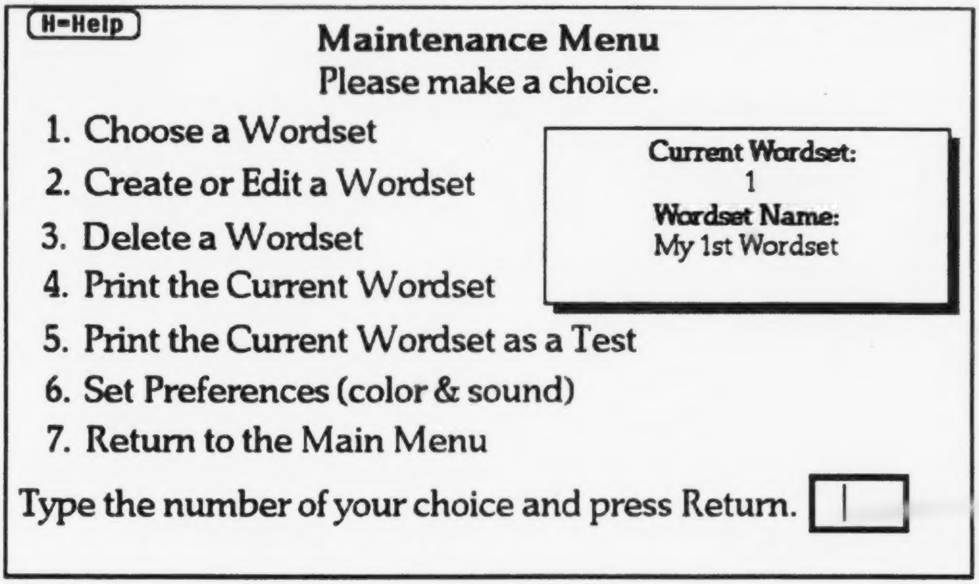

Learner Name
Wordset 1 - Computer Parts
11/30/93 Overall Score - 100%

Word	Times Accessed	Times Used Correctly?	Percent Correct
byte	4	4	100
capacity	4	4	100
CPU	3	3	100
cursor	3	3	100
diskette	3	3	100
drive letters	3	3	100
floppy disk	3	3	100
function key	3	3	100
hard disk	3	3	100
indicator light	3	3	100

This screen lists the words in the Wordset, as well as the number of times the learner encountered a particular word and how well the learner performed on a word. You may also print this information.

Maintenance Programs

To access this menu choice, you must use the master password ("Words") upon entering the program. When you choose **Maintenance Programs** from the Main Menu, this screen appears:



Maintenance Menu

Please make a choice.

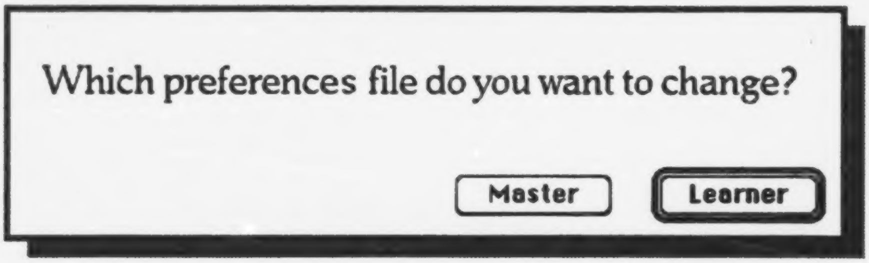
1. Choose a Wordset
2. Create or Edit a Wordset
3. Delete a Wordset
4. Print the Current Wordset
5. Print the Current Wordset as a Test
6. Set Preferences (color & sound)
7. Return to the Main Menu

Current Wordset:
1
Wordset Name:
My 1st Wordset

Type the number of your choice and press Return.

Choice 1 from this menu allows you to change the current Wordset. Choice 2 from this menu allows you to create or edit a Wordset. See the section on Wordset Creation for more information. Choice 3 allows you to eliminate a Wordset you no longer want. Any remaining Wordsets which follow the deleted Wordset will be renumbered. The Wordset names will remain the same. Choice 4 allows you to print the current Wordset. This is useful for your own records or as home-study guides. Choice 5 will first print the words in the Wordset at the top of the page. They appear in random order. Then it will print the sentences for each word with the target words missing from the sentences. This is a quick way to generate a test for the learners on a particular Wordset. Choice 6 gives you some control over the color and sound for the learner. This information is stored in a Preferences File.

When you use Choice 6, this screen will appear:



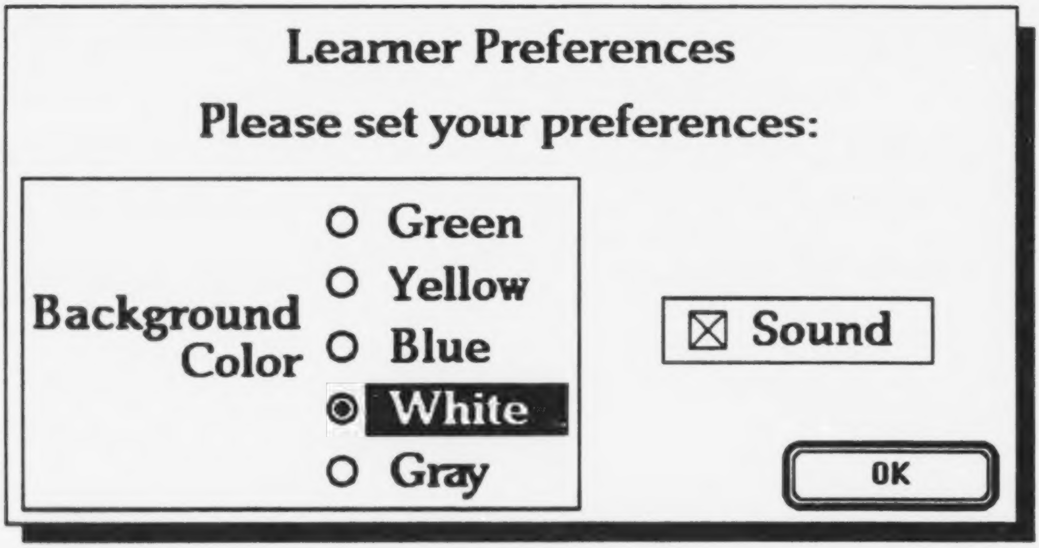
Which preferences file do you want to change?

There are two types of Preferences Files; a Master Preferences File and a Learner Preferences File. Initially, the software does not have any Preferences Files; it will use a default of a white background and no sound. After you create a Preferences File, the software will use it to determine the proper background color and sound options. The program software contains the Master Preferences File. The Learner Preferences File is stored on the Learner Data Disk.

The software always looks on the Learner Data Disk for a Preferences File first. If it finds one, it uses it. If no Preferences File is found on the Learner Data Disk, the software looks to the Master Preferences File and uses that information. If no Master Preferences File is found, a default of a white background and no sound is used.

Thus, if you wanted to have the same background and sound options for all your learners, you would create a Master Preferences File only. If you wanted to set different preferences for all your learners, you would create a Learner Preferences File for each learner. If you are satisfied with a white background and no sound for all your learners, you do not need to create any Preferences Files.

After you choose the type of Preferences File you want to create or edit, this screen appears:



Learner Preferences

Please set your preferences:

Background Color
- ○ Green
- ○ Yellow
- ○ Blue
- ● White
- ○ Gray

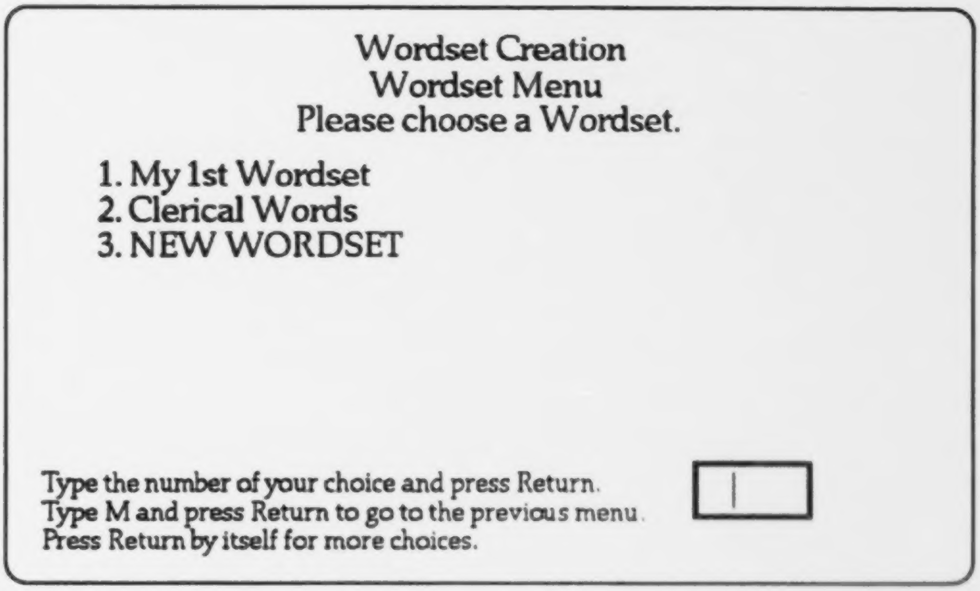
☒ Sound

Click on your choices.

NOTE: If you are using a black and white or monochrome monitor, use the white background. The other colors will distort the text on the screen.

Wordset Creation

A Wordset Creation Menu will appear when you choose to edit an existing Wordset or create a new Wordset.



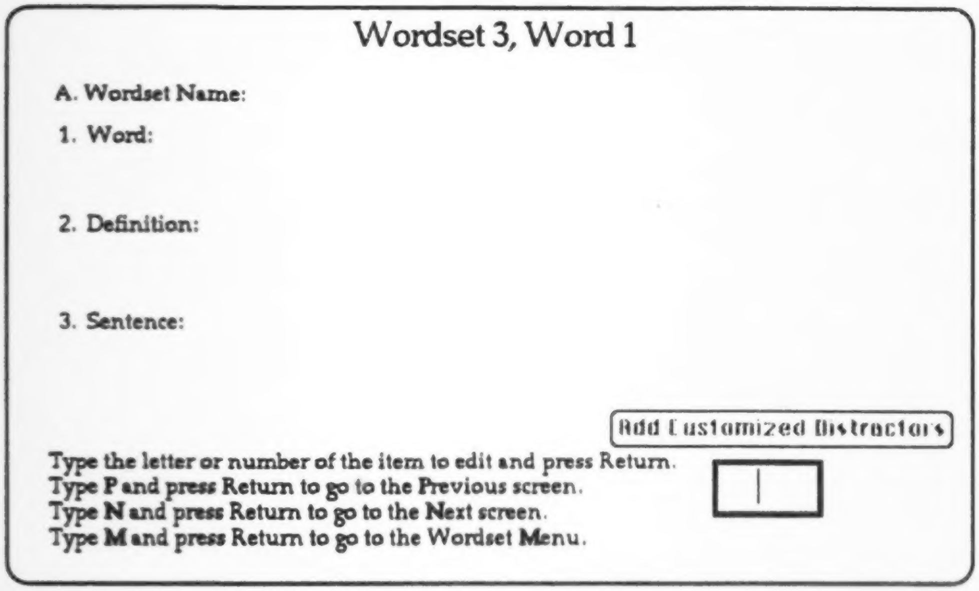
Wordset Creation
Wordset Menu
Please choose a Wordset.

1. My 1st Wordset
2. Clerical Words
3. NEW WORDSET

Type the number of your choice and press Return.
Type M and press Return to go to the previous menu.
Press Return by itself for more choices.

If there are more than seven Wordsets, you must press the Return or Enter key to page through the additional choices. The last choice in the menu will allow you to create a new Wordset.

If you choose to create a new Wordset, you will see this screen:


Wordset 3, Word 1

A. Wordset Name:

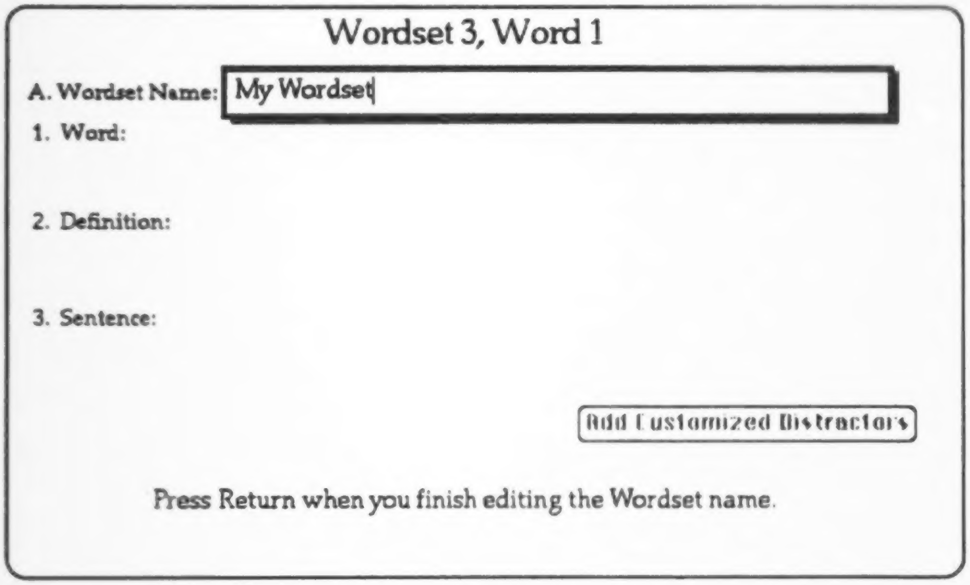
1. Word:

2. Definition:

3. Sentence:

Type the letter or number of the item to edit and press Return.
Type P and press Return to go to the Previous screen.
Type N and press Return to go to the Next screen.
Type M and press Return to go to the Wordset Menu.

You must enter a name for the Wordset, and at least five words, sentences, and definitions. Each Wordset you create can hold between 5 and 25 words, definitions, and sentences. To enter a word, definition, or sentence, type the appropriate number:


Wordset 3, Word 1

A. Wordset Name: My Wordset

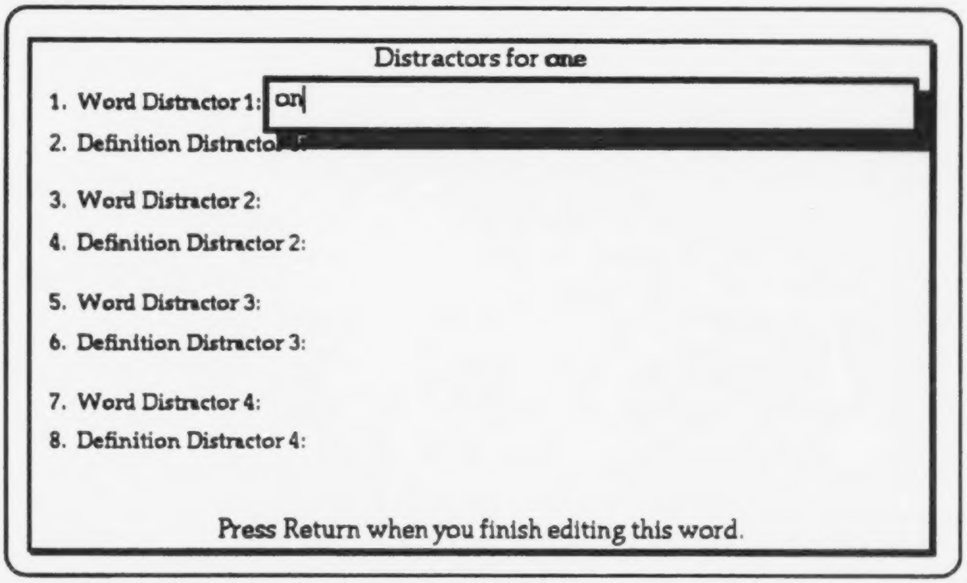
1. Word:

2. Definition:

3. Sentence:

Press Return when you finish editing the Wordset name.

After you enter a word, definition, and sentence, you may click on the **Add Customized Distractors** button to add your own distractors for the current word.



Distractors for **one**

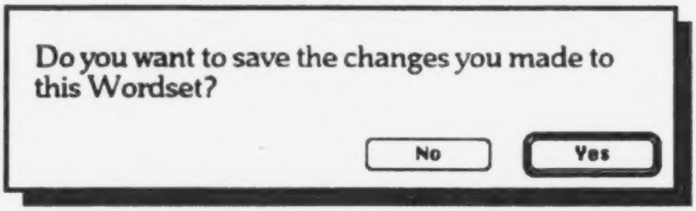
1. **Word Distractor 1:** on
2. **Definition Distracto**
3. **Word Distractor 2:**
4. **Definition Distractor 2:**
5. **Word Distractor 3:**
6. **Definition Distractor 3:**
7. **Word Distractor 4:**
8. **Definition Distractor 4:**

Press Return when you finish editing this word.

This is useful if you want to either avoid or distinguish among words that have similar or opposite meanings. You do not need to enter custom distractors. If you do not, the program randomly selects distractors from the other words in the current Wordset. If there are not enough words in the current Wordset, the program will randomly pull words from a list of 1000 high-frequency and survival words.

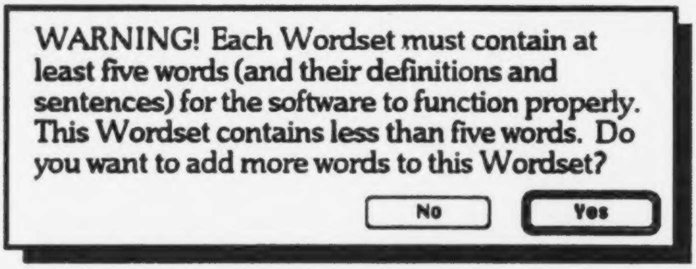
You may enter four words and definition distractors for each word. When you are finished entering information, press R to return to the previous screen.

After you enter a word, definition, and sentence, press N to enter the next word. When you are finished entering information, press M to return to the menu. A prompt will ask you if you want to save your work.



Do you want to save the changes you made to this Wordset?

If you have not entered five words, definitions, and sentences, you will see this message:



WARNING! Each Wordset must contain at least five words (and their definitions and sentences) for the software to function properly. This Wordset contains less than five words. Do you want to add more words to this Wordset?

It is recommended you create Wordsets with at least five words, definitions, and sentences.

Wordset Limits

- Each Wordset must contain between 5 to 25 words, definitions, and sentences.
- Each Wordset name can contain up to 50 characters.
- Each word can contain up to 100 characters.
- Each definition and sentence can contain up to 550 characters.
- Each custom word distractor can contain up to 50 characters.
- Each custom definition distractor can contain up to 250 characters.

File Information

Learner Data Disk Files:

- Learner.Txt - Contains the learner's name, the last date the software was used, and the learner's password in a scrambled form.
- STUDDATA Folder - Contains records used by the software for internal purposes. *Do not ever disturb this folder!*
- PREFS.TXT - Contains the background color and sound options information. It is created the first time you create a Learner Preferences File. The system looks for a Learner Preferences File first. It uses it if found. If not, it looks for a Master Preferences File. It uses it if found. If neither is found, it uses the defaults of a white background and no sound.
- LastSet.Txt - The last Wordset the learner used.
- WXDA.TXT - Information on how the learner performed on a particular Wordset, where **X** is the number of the Wordset.

Software Files on the Hard Disk:

VM Folder - Contains the following software files:

- Start VM - This is the file you double-click on to start the software.
- VMFILES Folder.
- Complete - The completion section.
- CreateWS - The Create a Wordset section.
- DandP - The Drill and Practice section.
- Distract.Txt - Random distractors. These are used when a Wordset does not have enough distractors to do certain activities.
- FillIt - Fill-in-the-Face practice activity.
- HideWord - Hidden Word practice activity.
- Menu - Main Menu section.
- MSPrefs.Txt - The Master Preferences File.
- MultDef - The multiple choice definition section.
- MultTerm - The multiple choice term section.
- VocGame - The Vocabulary Master practice activity.
- WordRace - The Word Race practice activity.
- VocScr.Txt - The top ten scores for the Vocabulary Master practice activity.
- FillScr.Txt - The top ten scores for the Fill-in-the-Face practice activity.
- HideScr.Txt - The top ten scores for the Hidden Word practice activity.
- RaceScr.Txt - The top ten scores for the Word Race practice activity.
- WORDSETS Folder - Contains all the Wordsets.
- WNAMES.TXT - Holds the names of all the Wordsets.
- WX.TXT - **X** is the Wordset number. You can have up to 9,999,999 Wordsets.
- DX.TXT - Holds custom distractors for a Wordset. **X** is the Wordset number.